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ABSTRACT

Developed for program facilitators in rural communities, Leadership Enhancement for the Active Retired (LEAR) is a training model that builds on the leadership skills and expertise of people who are retired from full-time employment, but are still willing to share their time and talent to benefit their community. Although other formats for the program are described, the typical format involves a 3-day retreat and eight weekly sessions. Topics include aspects of community leadership, interpersonal relationships, individual leadership skills, working with groups, holding effective meetings, public policy, the role of local government, and volunteerism. The manual is divided into three parts. Part I, Getting Started, describes how to go about setting up a LEAR program. Part II, Curricular Materials, consists of a series of model lectures that cover the major topics contained in the program. Lesson plans include classroom exercises, suggestions for outside reading, and reference to supplementary material found in the appendix. Part III, Appendix, consists of designated readings, overhead masters, class handout masters, reference materials, and other materials to facilitate the program. (KS)

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LEADERSHIP ENHANCEMENT FOR THE ACTIVE RETIRED

A Community Leadership Training Manual

With Separate Appendix of Resource Materials

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LEADERSHIP ENHANCEMENT FOR THE ACTIVE RETIRED

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PREFACE

Welcome to **Leadership Enhancement for the Active Retired (LEAR).** On behalf of those who have been involved in developing this program, this training manual stands as a symbol of their competent work.

This manual was funded through a grant from the W. K. Kellogg Foundation. The project was directed by the Center on Rural Elderly, Center for Aging Studies, University of Missouri-Kansas City.

Leadership Enhancement for the Active Retired is the product of many people. The concept for the program came about through the collaboration of Leo Cram, Philip Olson and Donald Boesch. The initial pilot project was directed by Don Boesch with assistance provided by Anna Jean Wade. Marvin Dobbs took over the pilot project during the second year, with Ms. Wade providing the needed continuity. The two secretaries providing support for the pilot project, Debbie Conners and Alice Lindsey, put in many hours of effort.

The expertise, leadership, proficiency and time devoted to the project by the developers of the content material are recognized with appreciation. The developers are: Don Littrell, Murray Hardesty, Elvis Clark, Eunice (Pat) Lieurance, Michele Merfeld and Anna Jean Wade.

The participants in the pilot project, the members of the advisory committees, and the administration of Mineral Area College were central to this program's success.

The dedicated efforts of JoAnn Rose, Center on Rural Elderly, and her role in the design and layout of the manual, have contributed immeasurably to the final product.

Carol M. Schultz, Co-Editor Program Specialist Center on Rural Elderly	&	Philip Olson, Co-Editor Project Consultant Center on Rural Elderly

LEADERSHIP ENHANCEMENT FOR THE ACTIVE RETIRED

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INTRODUCTION

Leadership Enhancement for the Active Retired, and its companion appendix of **Resource Materials**, have been developed for educators and program facilitators working in rural communities. The program formats and accompanying suggestions are designed to match the resources available in smaller communities. Facilitators using these materials will find they are adaptable to the special skills and talents of those living in rural areas. Facilitators will want to review the manual in its entirety before determining how best to utilize its contents.

The manual is divided into three parts.

PART I: GETTING STARTED consists of three chapters that describe how to go about setting up a LEAR program in your community.

PART II: CURRICULAR MATERIALS consists of a series of model lectures that cover the major topics contained in the program. It includes classroom exercises, suggestions for outside readings, and reference to supplementary materials found in the Appendix.

PART III: APPENDIX consists of designated readings, overhead masters, class handout masters, reference materials and other materials that will facilitate the program.

Inquiries and questions should be addressed to the Director, Center on Rural Elderly (816) 235-2180.

HOW TO USE THIS MANUAL

Effective programming for leadership training using this manual can best be accomplished by first reading through the entire manual. This will help in determining if your community is potentially ready to undertake this initiative. If a quick reading suggests that the community is ready for developing a leadership training program for its early retired residents, then a series of steps need to be taken:

STEP ONE: Identify the leadership needed to undertake the development of this program.

STEP TWO: That leader, together with a small steering committee will need to plan the program, starting with a careful reading of Chapters 1 and 2, which lay out the major objectives of the program and techniques for how to organize the details essential to producing a successful series.

STEP THREE: The resources necessary to implement the program will need to be identified: appropriate persons to deliver the class materials, a physical facility in which to hold the sessions, a system of publicity and recruitment of participants, minimally essential financial resources to defray costs of materials, the retreat, and other features decided upon.

STEP FOUR: Detailed planning of the curriculum, whether to use the retreat format, whether to have field trips, how many sessions to hold, the number of participants to aim for, a budget to carry out the program, a strategy for raising the funds, and a detailed planning time line for moving from these first stages to completion of the program.

AN OVERVIEW AND BACKGROUND OF THE LEAR PROJECT

by Anna Jean Wade and Philip Olson

Those interested in getting an overview of the program and in learning how it was developed may be interested in reading this section next. It will offer additional ideas on how to implement the program. Those wanting to begin planning immediately will want to go right to Chapter I.

Leadership Enhancement for the Active Retired (LEAR), an innovative leadership program for the older adult, was funded by the W.K. Kellogg Foundation, University of Missouri and Lincoln University in cooperation with Mineral Area College, Flat River, Missouri.

The training model builds on the leadership skills and expertise of people who are retired from full-time employment, but are still willing to share their time and talent to benefit their communities. The model was developed and implemented by the Gerontology Center, Mineral Area College as a demonstration project. Two test classes were conducted from the Mineral Area College campus.

The course curriculum for LEAR was developed after careful study of other successful leadership training programs. One of these, the Family Community Leadership Project (FCLP), sponsored by the W.K. Kellogg Foundation, provided a major portion of the resource materials for LEAR.

The demonstration project site — the Mineral Area region — can best be described as an urban community in a rural setting. It is located in the foothills of the Missouri Ozarks, one hour south of metropolitan St. Louis. The population is predominately of French and German heritage with 1.4 percent of the population reported as minority, according to the 1980 Census.

The Mineral Area region has experienced steady population growth since 1970. The 1980 Census reported that 85 percent of the population growth during that decade was due to movement into the region.

The region was originally a mining area, but has shifted to service, manufacturing, retail and wholesale business and tourism. Two Missouri correctional facilities and the Southeast Missouri Regional Mental Health Center were recently built in the area. Small businesses in the region increased by 21.9 percent from 1980 to 1984. The major category of employment recorded in 1980 was finance and services, followed by trade, state and local government and manufacturing.

The age distribution of the Mineral Area population is both younger and older than the State average. The 1980 Census reported 30 percent of the population age 18 or under and 16 percent age 65 or older. Approximately 33 percent of the households were occupied by married couples with children, 33 percent by married couples without children, and 10 percent single parent households. The remaining 23 percent were classified as non-family, meaning persons living alone.

The Mineral Area community serves as a medical center for the entire region as well as offering educational resources, including the Mineral Area Community College, founded in April 1965. The University of Missouri Extension/Mineral Area College Gerontology Center is located on the campus.

A unique aspect of the LEAR project was the decision to engage participants from the first class to help develop and modify the program curriculum. By combining the knowledge of experts in the field of leadership training with the experiences of older adults who had been through the first pilot class, LEAR evolved into a model that is especially sensitive to older adults.

Seventeen recently-retired persons from diverse backgrounds formed the pilot class for LEAR. Members of the class were largely self-selected. They learned of the program through local news articles, radio or through friends and then requested applications.

Members of the initial class ranged 48 to 72 years of age. Their level of education ranged from high school to master's degree. Members also represented a variety of career and work experiences, including a female construction contractor, retirees from positions in the commercial airline industry, corporate management, office work, education, and the military.

The pilot program was a "retreat" model, consisting of an intensive three-day educational retreat followed by eight weekly two-hour sessions. Sixteen of the original 17 participants finished the program. Five participants from the first class, showing particular interest in the success of the project, agreed to serve as a steering committee for the second-year class.

The committee received copies of the proposed curriculum for the second pilot class. This revised curriculum had built into it suggested modifications and revisions from the first year's experience. The steering committee actually served a dual function, reviewing the curriculum and also establishing guidelines for an advisory committee of past participants. This group became the project's advisory committee and worked closely with staff throughout the second year to improve the curriculum and procedures for the leadership training model.

Among the very practical suggestions made by the advisory committee was to change the name of the program from Leadership Enhancement for the Young Retired to Leadership Enhancement for the Active Retired.

Graduates of LEAR I and LEAR II training classes have established a permanent older adult leadership group working to influence decisions affecting the Mineral Area community. Some of the group's projects include: 1) a volunteer committee to establish educational programs and activities for the new Adult Center on the Mineral Area College campus; 2) the development of a clearinghouse for volunteer services in the area; 3) research on establishing an area-wide emergency phone number - 911; and 4) development of a volunteer center to provide advice to older residents regarding home repairs and social services.

Part I

GETTING STARTED

This section contains:

- overview of the LEAR program and its goals and outcomes
- the steps necessary to develop LEAR in a local setting
- some principles for working with older adults

Chapter 1

LEADERSHIP ENHANCEMENT FOR THE ACTIVE RETIRED

by Carol Schultz and Anna Jean Wade

The **Leadership Enhancement for the Active Retired (LEAR)** program is a vital community leadership training experience for the older adult. It is an innovative approach, based in community leadership theory, and can be used to build a positive future for everyone. The program developers believe that older adults can contribute significantly to the creation of positive, efficient and healthy communities.

In addition to teaching specific skills, the course is designed to enhance the self-confidence of retired people. The skills and abilities that older adults have honed through their lives can be transferred to community leadership situations. The program calls upon the leadership capabilities of the "active retired," encouraging them to use their time and talents in activities that strengthen their communities while adding purpose to their personal lives.

The new leadership functions learned in this program will encourage community involvement. It is designed to help emerging leaders analyze the problems facing them and to identify desired aims and outcomes.

Why a Special Leadership Course for Older Adults?

— People over 55 have the power, if they choose, to shape the future. Now, more than ever before in their lives, they have freedom, knowledge, experience and the power of choice. The active retired have more autonomy and often are less concerned about what others may think of them. They may choose to become involved in activities without fear of losing status or jobs.

— Many people are moving to smaller rural areas to retire. Most of the leadership opportunities at the community level are found working with city councils, fire departments, library boards, etc. The retired person, wishing to take an active role in the community, may need to develop new skills to assume these roles.

— Demographic analysis points to the fact that there will be fewer younger people in the coming decades to take leadership roles in rural communities.

— As life expectancy increases, many people can look forward to years of productive retirement. These people may want to assume new leadership roles in their retirement years.

— Retired workers who have held responsible positions during their careers can transfer these skills to community leadership. A wealth of talent is available for public and social services groups, if the retired know where and how to use their skills.

— Research studies on volunteer roles for retired individuals point to increased self-esteem for those involved in meaningful activities.

— Other factors which suggest the need to provide education for older adults include:

  - The widespread realization that adults continue to change and grow throughout their lives and frequently seek assistance in handling these changes.
  - Recognition of the greater proportion of adults in the total population due to increased longevity and declining birthrates.
  - Recognition of the need for occupational training or retraining due to changing employment patterns and opportunities.

Program Goals

Leadership Enhancement for the Active Retired is designed to achieve the following goals:

- Cultivate the skills and expertise older adults possess as a result of life and career experiences
- Enable participants to develop a clear understanding of the public decision-making process
- Introduce additional skills, as necessary, for older adults to grasp the complexities of public issues
- Identify methods older adults can employ to solve community problems

Expected Program Outcomes

Leadership Enhancement for the Active Retired is intended to increase the number of informed and skilled community leaders available to serve in:

- Leadership roles on organizational and agency boards
- Leadership positions of civic organizations
- Elected positions in city, county and state government
- Public problem-solving roles within the community, region and state

Chapter 2

STEPS FOR DEVELOPING A PROGRAM IN A COMMUNITY SETTING

by Anna Jean Wade and Carol Schultz

Leadership Enhancement for the Active Retired (LEAR) is not intended to be a canned or cookbook approach to leadership training for the older adult. It is designed to serve as a flexible model which can be shaped to fit the unique leadership needs and aspirations of individual communities. Just as communities differ, this leadership program will be different each time it is presented.

A program like LEAR can appeal to many different segments of a community. City and county officials, youth agencies, school officials, hospitals, non-profit and public agencies can all be persuaded of the value of using seasoned, trained older adults to fill the leadership positions on their boards and committees.

The time frame suggested for conducting this program can best be considered a guideline for planning purposes. Ideally, a period of seven months should be allowed for conducting a leadership training class using the **Leadership Enhancement for the Active Retired** model starting with the planning phase and concluding with the last training session.

Any agency, group or organization that understands the expanding need for qualified community leaders and those who recognize the skills and wisdom of the retired citizenry, are legitimate, potential sponsors for LEAR.

State level sponsorship of LEAR might include a university cooperative extension educational system operating within the state, as well as private corporations or public utility companies. Other sponsors could be any division of the state government or state agency concerned with the welfare and well-being of its older population.

Agencies, organizations, institutions or service groups that consider and meet the needs of the citizens within a regional area are appropriate sponsors for LEAR. Examples of regional sponsors are community college districts, regional planning commissions, regional agencies on aging, service groups or private corporations.

Local groups or organizations that might consider sponsoring LEAR, either independently or cooperatively, would include:

- Municipal government groups
- Area Agency on Aging
- Area service organizations
  - Lions
  - Rotary Club
  - Kiwanis
  - Chamber of Commerce

- Organizations of retired persons (local chapter)
  - AARP
  - Retired teachers
  - Retired federal employees

- Not-for-profit organizations (United Way)
- County cooperative extension organizations
- Churches, independently or cooperatively, eg; the local ministerial alliance
- Public schools, through the continuing adult education program
- Private corporate sponsorship (utility companies)
- School boards, town councils, or county governing boards

Community College Model

A community college might offer LEAR as a class through their adult continuing education department, utilizing college instructors and area presenters. In many instances, adult education is considered a service to adult citizens and such programs charge the participant only the fees necessary to cover expenses.

Adult Community Education Model

Public schools in most localities offer adult education classes at a reasonable charge to citizens within their district. LEAR would be appropriate as a class offered to older adults. The weekly or bi-weekly format could easily be incorporated into an adult education curriculum. The flexibility of the LEAR curriculum would allow its adaptation into any existing structural time frame.

Fund Raising to Support the Program

The amount of funding required to conduct LEAR will depend on the format and activities selected for each training class. The following suggestions may serve to identify possible sources for funding a LEAR program:

- Participants could pay the total cost
- Fund raising drives could be conducted
- Corporate sponsorship (for part or all of the program)
- Agency funds
- Endowment funds from local charitable trusts
- Local government funds
- Scholarships from business and civic groups
- Grants from private and public foundations: refer to the *Foundation Directory* — a comprehensive guide for available grant monies.

Almost every kind of fund-raising activity involves a series of specific steps according to Clifton and Dahms (1970), *Grassroots Administration*. Careful planning of each step will assure success. Insufficient attention to any of these steps can result in a loss of potential income.

1. *Identification.* First it is necessary to find out the who, where, when, what and why of potential contributors. Who is most likely to give money for the program? Where can they be reached? (Are there lists available containing their addresses and telephone numbers?) When is the best time to ask them for their contribution? What is the best way to solicit them in terms of effectiveness and cost efficiency? What approach will they best respond to? What issues are they interested in? Why are they likely to contribute to this project?

2. *Message.* Once the potential contributors have been identified and researched, a message needs to be developed and delivered to as many of these people as possible.

3. *Collection.* Having decided how to reach potential contributors, a collection program needs to carried out. When organizing the collection phase, always specifically ask for money rather than hinting about "needing support." Ask for a monetary contribution and, whenever possible, suggest a specific amount. One basic principle governs the various methods of solicitation — the more personal the contact, the better the response.

4. *Reporting.* An effective reporting system is frequently neglected as part of the fund-raising program. The reporting system should give the person in charge of the fund-raising effort an accurate indication of its progress at any given time. Moreover, the person or persons in charge of reporting should keep complete information records on all contributors.

5. *Follow-up.* Each person who contributes, regardless of the size of the gift, should be sent a thank you note from the staff or advisory committee. Not only is this the right thing to do, but it is also critical to the positive image of your program.

Remember the a key to successful fund-raising is to develop an appeal that emphasizes the benefits of the program for the whole community.

Suggested Formats for the LEAR Program

The curriculum developed for this leadership training model was planned so the training materials can be divided into two-hour instructional modules. This offers the organizations and communities conducting **Leadership Enhancement for the Active Retired** the flexibility to design a format that will fit their needs and constraints.

A retreat format for the LEAR program is recommended because it offers the group a time away from the tasks of everyday living that fosters the development of acceptance and peer support among the participants. The eight weekly sessions following the retreat allow participants to digest the information presented and consider its application in their present activities. Holding sessions over an eight week period provides the opportunity for participants to encourage and support one another as they use their talents and skills in new endeavors.

Retreat Model

- *Orientation Dinner.* For participants and their spouse or guest.
- *Retreat.* Intensive three-day education experience at a retreat center for participants and staff.

- *Eight Weekly Sessions.* Two hours each, with a scheduled break.
- *Awards Banquet.* Providing closure and an opportunity for positive reinforcement.

Advantages of the Retreat Model

- There is ample opportunity for individuals to develop personal relations with one another at the outset of the program, which fosters commitment to the program. This will enhance learning and minimize dropouts.
- The retreat provides the opportunity for the group to develop a feeling of trust, creating a bond among members of the class.
- It provides a time away from everyday distractions, which allows the participants to be more receptive to learning.
- The retreat allows participants to get good foundations in leadership techniques and to become personally acquainted with the instructors and the staff.
- It offers the opportunity to combine learning and fun.
- It sets the tone for the remainder of the sessions.

Disadvantages of the Retreat Model

- A retreat greatly increases the cost of the program.
- Some participants will be excluded either because they are reluctant to leave their spouse or have responsibilities that preclude them being away from home.

- Some participants have health concerns or problems that are best taken care of at home.
- Some participants may be hesitant to risk spending three days in a new environment with a group of people they do not know.
- It takes more planning time.

Other Suggested Formats for LEAR

The format for each individual training class can be designed to fit the needs of the participants as well as the communities and organizations offering the program. The local advisory committee selected for each **Leadership Enhancement for the Active Retired** program will have this task. Thirty-five hours of instructional time will be needed if all of the curriculum topics are included.

The following are examples of different formats for presentation of the **Leadership Enhancement for the Active Retired** program:

1. Weekly sessions of two hours each, with a time frame of 18 weeks.

Week 1	Orientation dinner
Week 2-17	Weekly sessions
Week 18	Awards banquet

2. Bi-weekly sessions of two hours each, with a time frame of nine weeks.

Week 1	Orientation dinner
Week 2-8	Weekly sessions
Week 9	Awards banquet

3. Daily sessions of four hours each, with a time frame of two weeks, plus the orientation dinner and awards banquet.

Week 1	M-Th
Week 2	M-F

4. Sessions three days a week, six hours per session, with a time frame of two weeks, plus one additional meeting, the orientation dinner and awards banquet.

Week 1	Choose optional days M-W-F or T-W-Th
Week 2	Continue weekly sessions on chosen days

5. Two weekends and weekly sessions, with a time frame of two weekends and either four weeks or eight weeks of sessions; orientation dinner held week before, awards banquet held during last week of sessions.

Week 1	Weekend: Friday 7-9 p.m. = two hours and Saturday 9-12 a.m. - 1-4 p.m. = six hours
Week 2	Weekend: Friday 7-9 p.m. = two hours and Saturday 9-12 a.m. - 1-4 p.m. = six hours
Week 3+	Eight weekly sessions or four bi-weekly sessions

The following are considerations in making a decision on format mentioned by the participants in the pilot sessions of **Leadership Enhancement for the Active Retired**:

- Commitments that last over an extended time are not desirable.
- Married participants whose spouse is not participating in the program may find the weekend model undesirable.
- Most participants attend church regularly and regard Sunday as a family day.

- The least desirable months for commitments such as LEAR are December and the late spring-summer months.

Cost Issues

The flexibility of the LEAR model allows communities and organizations to design and implement training programs that are in keeping with the funds they have available. This flexibility, along with the number of variables involved in designing a program, make it very difficult to estimate the cost of conducting training sessions. Since each program will be somewhat unique, it is equally difficult to draw a cost comparison among the available formats.

The cost involved in conducting LEAR could vary from the retreat model costing several thousand dollars, to the weekly or bi-weekly sessions model costing very little. The retreat format is certainly the most costly model; however, even the cost of that program would vary according to the retreat site, price of rooms, number of participants attending, time involved and the cost of the instructors.

In contrast to the more costly retreat format, the weekly or bi-weekly sessions format could be conducted with minimum funding. For example:

- Orientation dinner
    - — Could be pot luck or dutch treat

- Weekly sessions or bi-weekly sessions
    - — Conducted in civic meeting rooms for which there is no charge

- Training Materials
  - — Participants responsible for their note-taking supplies

- Awards Banquet
  - — Dutch treat

- Educational Tour
  - — At participants expense

- Instructors
  - — Select local instructors who would volunteer their time and talent to the program

Some of the variables that will influence and determine the cost of conducting a LEAR program locally include:

- Format selected
  - — Retreat model or weekly/bi-weekly sessions

- Orientation Dinner
  - — Number of participants
  - — Participants only
  - — Participants only and spouses
  - — Type (catered, restaurant, pot luck)
  - — Site

- Retreat (if appropriate)

  - Site
  - Rate - winter
  - Length of stay

- Sessions

  - Site - rental or no cost

- Instructors

  - Volunteer
  - Mileage and meal only
  - Honorarium

- Training materials

  - How much material provided to participants

- Awards banquet

  - Format (catered, restaurant, pot luck)
  - Who is invited
  - Who is asked to pay
  - Site

- Educational tour (if appropriate)

  - Site
  - Length
  - Number of participants attending
  - Hotel rates if overnight
  - Transportation

Recruiting Participants into the Program

There are many special personal and professional characteristics which make older citizens outstanding volunteer leaders in a community. Among these are:

- *Knowledge and Skill.* Older adults bring years of experience and a wide range of insights and knowledge into all facets of their lives (i.e., communication skills; knowledge of the community; and the mastery of methods and techniques for getting things accomplished).

- *Motivation.* Many older people believe in helping others and they desire to continue making positive contributions to their community.

- *Conscientiousness.* Older adults often possess a strong work ethic and pay careful attention to detail. Most go above and beyond the call of duty.

- *Dependability.* Older adults accrue impressive attendance records. They are a stable source of person-power because of their low turnover rates and they exhibit steady performance over the long-run.

- *Influence.* Many older adults are members of the community leadership structure and they bring with them new and important personal and professional contacts and acquaintances.

- *Availability.* Older adults have flexible schedules and can devote significant amounts of time to meaningful projects.

Tips for Recruiting Older Adults into LEAR

- People who have volunteered previously or are current volunteers in community organizations offer good potential.

- People may not readily volunteer for LEAR unless asked, so personal contact is very important in this program.

- Do not wait until a person retires. Approach him/her two to three years before retirement. Start helping that person realize his/her own potential.

Places to Look for Participants

- Individuals known personally by those conducting the program.

- Senior citizens' groups, such as:

    — AARP
    — Retired teachers
    — Federal employees
    — Clubs at local banks
    — Civic clubs
    — Nutrition centers

- Seek referrals from:

    — Local ministers
    — Local employers
    — Public school personnel
    — City government officials
    — University extension personnel

  - — Welcome Wagon personnel
    (They know many people who have moved into the area)
  - — Organizations that use older volunteers
    (hospitals, mental health facilities)
  - — Ask those who apply to suggest friends or others who might like to participate in LEAR.

- Approach local businesses to help identify persons likely to retire within 2 years

Suggestions for Gaining Minority Involvement in LEAR

Researchers have only touched the surface of information on minority elderly. There is little knowledge of the unique socioeconomic and cultural context in which the minority elders live.

The following set of guidelines provides information for educators and practitioners who will be working in minority communities and recruiting minority elders into the program. The following suggestions may prove helpful during the program development stage:

- Seek minority representatives, as the program is being developed, who can provide insightful input into the total program, not merely the minority portion of it.

- Make a strong effort to involve minority elders and their perspective as much as possible. Minority ministers, social service professionals, teachers, and community leaders at the local level or at state and national levels can assist you. However, the best input will come from the minority elders themselves.

- Transportation may be a big problem for minority elders. Visit with them in their home if they can't come to you, or telephone them. Local churches and social service agencies as well as post office, governmental and school officials can assist in locating elderly minority representatives.

- Be patient and listen well to what they have to say. Record their responses, if possible, so that you can digest their reactions. The dialects may be difficult to understand; however, tape recordings can allow you to review and better understand their assessments of the situations you wish for them to address.

- Indicate that you want and value their input and that their participation is needed in the assessment and program development process. Be aware that they will assume their input won't matter much. You must continue to assure them that their perspectives are legitimate and valuable to the process.

- Indicate your appreciation for the minority elderly's participation, encourage others to support the minority elderly at this stage.

- Involve minorities in the policy areas as well as the program areas. Let them know they have an ownership stake in the program. Support the right of self-determination by presenting them with options to consider.

- At the program operations level, start by having minority representatives serve as an integral part of the operations as staff, volunteers, and as consumers of the program. The local churches, the media, and governmental agencies can assist in locating and communicating the need and opportunity for minority involvement.

- Allow the minority elderly to maintain their personal dignity. Arrange transportation for them to participate in the program. Conduct the program at hours and locations convenient for them. Consider minority dietary habits in your program if meals are provided. Make sure that more than superficial and haphazard services are provided to them.

- Ask minority members to recruit other minority members for the program. Encourage them to help you make the program meaningful to them and other minority members.

To maintain contact with the minority elderly, use the personal approach.

- Visit them at home.

- Telephone them if you can't visit them. If they don't have a telephone, find a neighbor who has a telephone who will personally communicate a message for you.

- Obtain a list of nearby relatives, friends, churches with whom they have close contact.

- Send stamped, self-addressed envelope if a response is needed.

Selecting Staff

As preparations are made to conduct **Leadership Enhancement for the Active Retired**, selection of the coordinator for the program and selection of instructors for the training sessions is very important.

One person who can act as coordinator of the program should be chosen by the sponsoring group or agency. This person is the one who will provide the continuity for all the sessions and tie the content of the sessions together. When using several instructors who only come in for their particular session, it is crucial that the coordinator is a person who can relate the lessons to previously learned material. The coordinator should be able to note points that are being made in different ways and be able to explain differences in the various presenters points of view.

The following guidelines should be considered when selecting instructors for the sessions:

- Instructors need to have practical knowledge of the subject matter they are asked to present.

- Instructors need to be aware of the experiences and educational skills of the participants.

- The purpose and goals of LEAR need to be communicated to the instructors in advance of their presentation so it will fit within the framework of the total curriculum.

- An outline of the session with the specific topics to be covered will help the presenter focus on the topic.

- Instructors need to be versed in the methods of adult education, especially those techniques that relate to older adults.

Places to look for instructors for the LEAR program include:

- College and university faculty (Personnel from county university extension offices can be helpful in suggesting and scheduling instructors.)

- Local community college faculty

- Public school administrators; teachers and counselors (Vocational agricultural teachers and sponsors of student government groups have extensive training in leadership development.)

- Executives of corporations that conduct training programs for employees (especially utility companies)

- Personnel that work for not-for-profit organizations training volunteers and lay workers (example: YMCA, Red Cross, Boy and Girl Scouts, Cancer Society, Alzheimer's, AARP)

- Ministers (Some ministers are very civic minded and would make excellent presenters for sessions such as: "Working With Small or Large Groups.")

- Retired executives and professionals

  - — Judges
  - — Lawyers
  - — Corporate managers
  - — Administrators of schools, hospitals, etc.
  - — Teachers and counselors

- Participants (Many of those choosing to participate in LEAR would qualify as instructors for the sessions by virtue of the knowledge and skills they have acquired throughout their careers.)

Program Planning Time Line

The following is a suggested time line and recommended monthly task plan:

Month #1 Tasks

1. Acquire the leadership training materials.

2. Select a local citizens advisory committee from older adults and civic leaders and provide them with copies of the LEAR materials for review and study.

3. Define for them that the advisory committee will give input and advice related to decisions regarding:

   - Format of the program and choice of activity sites
   - Boundaries of the community to be targeted for the program

- Size of the class and the selection criteria for participants
- Focus of the training materials
- Funding
- Marketing strategies
- Follow up activities after the program has concluded

Month #2 Tasks

1. Finalize the format chosen for the program.

2. Establish dates and make tentative arrangements for:

   - Orientation dinner

   - Retreat (if a retreat format is selected)
     — site
     — time frame
     — presenter or presenters who will conduct sessions

   - Individual weekly sessions

3. Determine the community to be targeted for recruitment and develop a list of prospective participants.

4. Determine the class size and develop the selection criteria for participants.

5. Determine the leadership needs of the community and determine the focus of the training materials desired.

6. Determine the amount of funding needed and explore sources to acquire funding.

Month #3 Tasks

1. Develop necessary marketing materials, for example:
    - brochures
    - flyers
    - application forms
    - scholarship forms

2. Arrange for presenters of selected topics for the weekly sessions.

3. Plan marketing strategies.

Month #4 Tasks:

1. Market the program to reach older adults in the target area.

2. Receive and process applications.

3. Select and notify successful applicants and invite them to attend the orientation dinner (phone and written verification are recommended).

Month #5 Tasks

1. Hold the orientation dinner.

2. Conduct the retreat (if the retreat format is selected).

3. Conduct the first two weekly sessions.

4. Plan the educational tour (if this option is selected).

Month #6 Tasks

1. Conduct the next four weekly sessions.
2. Arrange for leadership training certificates, if they are to be awarded.
3. Finalize plans for the educational tour (if decided).
4. Plan the awards banquet.

Month #7 Tasks

1. Conduct the final two weekly sessions.
2. Conduct the educational tour (if appropriate).
3. Host the awards banquet.

Tips For Implementing LEAR

The process and experience of conducting two pilot classes of LEAR led to several suggestions that may prove useful to other groups as they develop this program in their own communities:

- Select a local advisory committee that represents a cross section of the community. Choose people who understand funding, are known and have credibility with area residents.
- The timing of the program is important when working with older adults. They are busy in the summer and December. We found late winter to early spring a good time to offer the program in our area.

- Don't look exclusively for college graduates as candidates for your program. Many of today's older adults are self-educated. Life and career learning experiences can be as meaningful and relevant as formal education. Encourage members of minority groups to apply.

- Asking participants to pay a fee can be desirable because it represents a commitment on their part to the program. The fee, however, should be reasonable, as the income of many retired citizens is limited.

- We found that when both a husband and wife participated in the class, the over-all effect of the program was magnified.

- LEAR proved to be an excellent experience for older adults who recently moved into the community or who were adjusting to the loss of a spouse. This program offers them an opportunity to get involved and to establish needed relationships.

- Make a special effort to include the spouses of the participants in some of the activities. The orientation dinner is an especially good inclusive event, as it gives them an opportunity to meet the group.

- Provide informal time for sociability! It allows the participants to build relationships within the group that have a positive impact on their self-confidence.

- A personal visit with presenters before they conduct a class will allow you to communicate the goals of the program and increase the likelihood that their presentation will be relevant.

- Involve the local news media early. Invite them to attend organizational meetings and meetings of the advisory committee so they will understand the program. Because they share a concern for the community, the media can become an important ally of your program.

- Consider the needs of individuals who are participating in the program and provide the opportunity for them to take an active part in their learning experience.

- Don't feel it has to cost a lot of money to conduct a LEAR program. Creative ideas, good local support, people who want to improve the quality of life in communities, and this model are all you need!

Chapter 3

WORKING WITH OLDER ADULT LEARNERS

by Carol Schultz

Teaching The Older Adult

Teaching any subject or skill to older adults involves procedures and attitudes which differ from those normally used with younger students. Many instructors are skilled in working with young people, but fewer have taught older adults, or have training in how to do so. For this reason, guidelines for teaching older adults are included in this chapter.

The concept of andragogy, developed by Knowles (1980) is one that fits older adult learners well. Knowles classic text (listed in the reference section) can be perused for further explanation. However, a brief discussion of the assumptions of andragogy is presented here.

Andragogy assumes a process of change, from the dependency of childhood to the self-directed, independence of adulthood. However, it cannot be assumed that older adults will automatically be self-directed learners. They can be encouraged, though, to express more autonomy in the learning process.

Andragogy assumes that the learner has a reservoir of experience which provides both a resource for learning and a basis for relating new knowledge. In the case of older adults, this is especially true. The instructor/teacher can help the adult learner recognize connections between past experience and current learning situations.

Andragogical learning is based on the "need to know" rather than the "ought to know" of pedagogy. Motivation for learning is directly related to the perceived needs of the learner.

Finally, andragogy assumes an orientation to learning that is problem-centered. The adult comes to the educational activity because of an inability to cope satisfactorily with a problem or situation.

With adult learners, instructors will not be teaching in the usual sense. Instructors will be "facilitating learning" (Brookfield, 1987). Instructors must attempt to draw from their students' experience as it relates to the new material. Participants in the program can become resources as they share their expertise and experience.

Guidelines for Teaching Older Adults

1. Establish a non-threatening, friendly atmosphere in the classroom.

While many adult learners have been active, productive citizens for years, they may not have experienced formal learning situations. In addition, the educational level of older persons is sometimes below the average for the general population. Thus, older learners may lack confidence in their roles as learners and find a formal educational experience uncomfortable.

To reduce anxiety, the instructor should be sure that participants understand that their performance will not be graded. Instructors should encourage participants' efforts and avoid seeming critical. Instructors may need to spend extra effort with adult learners to build confidence. In all learning situations and especially with older adult learners — security promotes learning.

Rewards can be used to establish a secure, friendly atmosphere and encourage the learner lacking confidence. Rewards may be verbal reinforcement, a smile, nod, or an occasional physical expression, such as a handshake, pat on the pack, touch on the arm or hug.

If a learner expresses unhappiness about a situation, focus on how the student *feels* about the external situation. Avoid attempts to change or remedy the situation for the learner. If a learner says something which demeans him/herself, the instructor is advised as follows:

- do not contradict the person's view;
- do not refute the person's view with logical explanations;
- do not ridicule the person's view;
- *do* convey positive regard for the person.

Certain words, phrases, gestures, or actions will go far to build a supportive atmosphere in which learners feel able to grow, learn, and respond. An instructor might try:

- a smile;
- responding to a raised hand;
- a pat on the shoulder;
- an expression of enthusiasm;
- showing pleasure at seeing participants again;
- listening with patience;
- warm attentiveness;
- helping students who are having difficulty.

2. Show respect for the opinions and experience of older adult students.

It is wise to remember that these learners are adults: they are used to being respected and perceived as individuals capable of running their own lives. They will not settle for the role of passive listener. In addition, they are learners by choice. Unlike children, they have volunteered for the course, and therefore, they should not be embarrassed, punished, ordered around, or talked down to. They also should be involved, as much as possible, in planning and conducting the course.

3. Encourage discussion in the classroom.

Older adults have wisdom accumulated from many years of experience and they possess manifold talents and skills. A mutual exchange of these experiences and talents can be beneficial to all participants. New information will often be more easily and readily grasped when related to past experience.

Listening is especially important when working with older adult learners. It is important to effective teaching because much learning takes place while a student is expressing an idea. The attention a student receives while speaking can encourage his learning and interest, or inhibit it.

A teacher can listen and encourage the student to speak further by an acknowledgment, either a verbal "uh-huh" or "I see," or non-verbal cues, such as a nod or smile. More discussion can be stimulated with what are called "door openers," such as: "Would you like to talk about it?" or "Would you like to say more?" Instructors who wish to show that they are good listeners may find the following tips helpful:

- Try to understand the intended meaning of the speaker
- Do not interpret the speaker too quickly
- Put aside your own views
- Do not jump ahead of the speaker
- Do not prepare your response while listening
- Show interest and attention
- Do not interrupt
- Expect the speaker's language to be different from your own
- Provide positive feedback
- Avoid negative feedback

4. Speak slowly when presenting information and reiterate and review major points often. Check frequently with learners to make sure that points have been understood.

Intellectual ability, if used, does not drop with age. However, slower reaction times, memory declines, and lessened ability to integrate and organize responses inhibit the rate at which older students can efficiently process information. Material should be presented at a slower than usual rate and new information should be related to what is already known. It is also helpful if basic points are illustrated in numerous ways, e.g., demonstrations, slides, discussions.

5. **Be concrete and specific whenever possible. Don't dwell too long on strictly theoretical information.**

Many adults engage in education in response to immediate personal problems. They regard the learning process as a means of improving their ability to deal with these problems. If the student feels that the educational process is not meeting particular needs, he/she may cease attending the program. Practical, problem-centered instruction will be more relevant and interesting to older students than pure, theoretical information.

Throughout the course, discussion should be personalized and localized so that participants are made aware of what they can do to work out their problems. Older adult learners welcome concrete and defined examples of possible actions.

6. **Encourage learners to talk about their own past and present leadership experiences.**

Controlled group discussions, especially in initial sessions, can allow participants to verbalize their personal experiences with leadership. Given sufficient opportunity to discuss their experience, with the guidance of an instructor, students will be more receptive to new ideas. They will be more able to look at their behavior objectively and admit deficiencies, thus being more open and prepared for the "relearning" process.

7. Be aware of visual and hearing problems which participants might have.

While the physical declines associated with aging do not occur at the same rate in all individuals, there are certain declines which can be anticipated. If you are sensitive to problems among your own groups of learners, you can minimize the effects of these problems on learning ability.

Speak distinctly, directly facing the group. Make sure that slides and other visual aids are visible to all students. Write in large letters when using the blackboard.

Using the Print Media

Be aware of the best combinations for print and colors in your handouts, posters and other printed matter. Research has shown the following combinations as better for older adult audiences. Keep materials simple and low cost.

Color Configuration

- Black print on white background is best; color on color is not good.
- Older adults often see red, orange, and yellow better than blue, green, and purple.
- Shiny paper reduces the contrast. Enlarged and poor quality print often "muddy" the edge of an image and reduces contrast.
- Yellow has the capacity to enhance visibility.

Print Size and Style

- Always make sure that copies are clear and readable. Make a new master to assure good copies.

- Large type has been shown to be preferred by older readers (nothing smaller than 10 pt.).
- Smaller type with an additional point or two of spacing between lines can be used to create the desired effect, conserve paper space, and maintain readability.

Composition and Spacing

- Proportional spacing should always be used where the white space between the letters is kept constant, regardless of letter width.
- Identification of paragraphs and the use of standard capitalization also provides visual clues which improve readability.
- A comfortable line length is from five to six inches. Margins wider than a one-fourth inch have little impact on readability with the exception of a bound publication.
- A straight left hand margin helps readers follow the copy.
- Be sure that the printing does not get lost in the binding on the left margin.

Selecting a Location

The physical setting of a course for older adults can be critical to assuring the success of the course, forethought will provide students with an optimal environment for learning. The following checklist is provided for the instructor faced with the responsibility of securing a setting for the course.

The Building:

1. *Accessibility.* The building should be in an area which is easy to get to and close to most participants' homes. For example, the local high school, church, or community college might provide a convenient location.

2. *Parking.* Ample parking should be available near the building.

3. *Stairways.* Stairways into the building should be minimal or nonexistent. Ideally, the facility should be "handicap accessible".

The Room:

1. *Accessibility.* The course should be given in a room on the ground floor; if this is not possible, elevators should be available for use.

2. *Lighting.* The room should be well lighted but also capable of being darkened in order to use audiovisual equipment.

3. *Heating.* It should be adjustable.

4. *Electrical outlets.* Since audiovisual equipment will most likely be used, it is important that outlets be available.

5. *Noise level.* The room should be located in a quiet area of the building.

6. *Furnishings.* Optimally, a number of long tables should be available for use; chairs and desks are usually better than chairs alone, which can be particularly uncomfortable if they are inappropriate in size. Lounge chairs are not recommended. Furniture should be moveable.

7. *Rest rooms.* These should be clean, well-marked, and close to the class room.

Preparing the Room

Furniture Arrangement

Chairs and tables should be arranged in a semicircle so that all students can see the instructor as well as each other. It is also important to have students as near to the instructor and the visual aids as possible. A place to display handout material is important.

Flip Chart and Markers

A flip chart is very important for this course. Sessions build upon each other. To maintain the continuity of the class, the large sheets of paper from the flip charts are vital and should be retained. Have one flip chart for each group. Black markers are usually preferable as they are more easily seen.

Blackboard and Chalk

A blackboard should be available and visible to all. It should be washed often to ensure contrast. Thick chalk should be used.

Audiovisual Equipment

Audiovisual equipment should be placed so as not to interfere with anyone's view or hearing. Location should be determined ahead of time, and cords should be well marked, taped down, and kept to the side of the room, if possible. All visual aids should be tested before class time. Extra bulbs and other parts likely to fail should be on hand.

Refreshments

Any refreshments, such as coffee or tea, should be prepared ahead of time and placed in an area of the room where students may socialize.

Directing Students to the Class

Maps

Send students an easily readable map indicating the location of the building, parking areas and the entrance to be used. The room number and time of the course should also be noted.

Signs

Signs should be provided to direct students from the building entrance to the classroom. (Consider that there may be more than one entrance to the building.) Signs should also be placed to direct students to rest rooms.

Providing Name Tags

Oblong pieces of poster board which can be folded to serve as large place cards should be prepared for the students to place on the table in front of them. The instructor should prepare the name cards ahead of time to ensure that the writing is uniformly large and legible. This can be done in advance if a student list is available; otherwise, the instructor should prepare the cards as students arrive. Stick on name tags should also be utilized. Be sure there is a black felt-tip pen available for participants to use.

Part II

CURRICULAR MATERIALS

Part II contains all of the lesson plans. Each is set up in the following format:

- Title of session
- Session number and length of time
- Handouts and where they are located in the Appendix
- Equipment needs (if any)
- Lecture material

The lecture materials include

- Instructions to the lecturer (in italics)
- Exercises for the class members (boxed)
- Lecture material

Chapter 4

GETTING READY FOR LEADERSHIP ENHANCEMENT FOR THE ACTIVE RETIRED

by Don Littrell

RETREAT SESSION 1.1 - TWO HOURS

HANDOUTS	Any schedules, maps or instructions about the retreat.
ADDITIONAL PREPARATION	Have each person's name written on a small sheet of paper so that each participant can draw a name for introductory interviewing.

....

Welcome, Purpose, Schedule, Orientation

EXERCISE: Go around the room and have everyone introduce themselves in a general way. Introduce the program organizers, instructors, special guests, etc.

Lecture

Agenda and Philosophy of the Program

Leadership Enhancement for the Active Retired, is designed to introduce you to a new way of thinking. Together we will develop a shared image of the future and expand our way of looking at the future. We are so accustomed to thinking in terms of "fixing the mistakes of that past," that we often feel helpless, hopeless and overwhelmed when we think about our roles in the community. This program will give us specific tools to begin to shape the future for ourselves and our grandchildren.

People over 55 have the power, if they choose, to shape the future. Now, more than ever before in their lives, they have freedom, knowledge, experience and the power of choice. The active retired have more autonomy and often are less concerned about what others may think of them. They may choose to become involved in activities without fear of loosing status or jobs.

Schedule for the Program, Orientation to the Setting, Special Announcements

(Announce these details as arranged for your program.)

EXERCISE: Prior to the meeting write the names of all of the participants on small pieces of paper; or at the time of the first meeting, ask each person to write her/his name on a small sheet of paper and place these all in a container. Ask each participant to draw a name. Ask each person to interview the person whose name they have selected. Instruct the participants that they will be asked to introduce this person. Coach them to find out something about the other person (where they live, occupation before retiring, family), but most important, encourage the participants to find out why others are interested in the LEAR program. Allow about 5 minutes for this activity. Ask each person to introduce the person they interviewed.

General Comments About Leadership

Leadership is fun! This program will be fun! We will make a contract with each other from the beginning to enjoy ourselves. I want to let everyone know that it is all right to disagree with me and with other participants. We will recognize that there will be differences of opinion and of values. Each time you hear something that you disagree with, treat it as another piece of data — a piece of information — which you may add to your store of knowledge.

When are you a leader? Every time you walk out the door you are demonstrating leadership. You do what you do based on what you think. Your automatic reaction stems from your belief system.

There are three great mysteries in American life: *them, those* and *they*. Somehow responsibility for most of our problems is transferred to these three entities. If you think about it, we often transfer responsibility for reactions to our behavior to someone else. When people don't respond the way we want them to, we blame them.

Try to think of yourself as a tool. In each interaction in your community you are making a conscious intervention. You will make judgments about every situation. Think of this leadership program as a way of putting tools in your leadership tool box. As you gain tools, you will gain choices. You will gain new and different tools to use in your day-to-day interactions.

When things don't work, people tend to do the same thing, only faster. We do this, rather than risk trying something new. People tend to get into a rut and do the same thing over and over. This program will offer you new ways of thinking about leadership and problem solving. These new ways of looking and thinking about situations will get you and your community group out of dead-end routines.

What is Leadership?

"Leaders are born, not made." How many times have you heard that? People have believed this for years.

About 40 years ago, scientists started investigating the "why" and "how" of people who become leaders. How do leaders retain positions of authority and acquire followers?

Researchers have found it is difficult to clearly define terms such as leader and leadership. To some people, leadership is a property or characteristic of a group that performs certain roles and functions. For others leadership is a characteristic of the individual.

For those who favor the group based definition, leadership may be used as a synonym for the prestige which may go with holding a particular office. This position of authority may require the performance of activities that are important to the group. The position or office may also entail a certain type of emotional relationship between the leader and the group members.

For those who favor the notion of leadership as a characteristic of the individual, leadership means the possession of certain personality traits, such as dominance, ego-control, aggressiveness, assertiveness and power.

Focusing, for our purposes, on the group centered approach to leadership, we can see that leadership prescribes certain kinds of behavior for all group members, including the leader. One of those prescriptions is "mutual responsibility" for group outcomes. This prescription also carries a belief in shared power and authority. According to this theory:

- Leadership is a shared function of the group.
- Leadership involves active listening by both leaders and members.

- Leadership involves building toward a mature, productive group, and maintaining that group.

- Leadership involves service and assistance to the group.

- Leadership requires attention to concealed or disguised events.

- Leadership involves a group, not a collection of individuals.

Leadership is essentially a human relations effort. All relationships require constant experimentation. Most people are more comfortable working with abstract ideas than with human relationships. As we experiment together in this program we will all be striving to be more effective human beings.

Chapter 5

LEADERSHIP FUNCTIONS VS. LEADERSHIP

by Don Littrell

RETREAT SESSION 1.2 - TWO HOURS

HANDOUTS	Individual Leadership Skills: Task Accomplishment Skills Individual Leadership Skills: Personal Relationship Skills *(See Appendix: Retreat 1.2)*
EQUIPMENT NEEDED	Chalk board and chalk or a flip chart with markers

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Lecture

Leadership is a four letter word: WORK.

Leadership doesn't just spring forth out of nowhere. It is not as simple as a charismatic leader coming forth at the right moment to save the day. Leadership is, more often than not, work to be performed.

Name some leaders you know. *(Most will name elected officials, presidents of clubs they belong to, ministers, etc)*

In this course we will be thinking in terms of **leadership** — not leaders.

We usually think of a leader as a personality functioning in some kind of position of authority. But I would like for you to think instead of **leadership as a group of tasks to be done**.

Many people haven't learned to fill leadership roles and so are reluctant to be designated as "leaders" in their community or group. We've all heard that the number one fear of most Americans is the fear of speaking in front of a group. What do we usually think of a leader doing? Speaking in front of a group!

It is also true that most people would rather plead lack of interest than ignorance or fear. Don't you find yourself saying "I'm not interested," rather than "I don't know" or "I'm afraid," when asked to take on a leadership function? This is why the tasks get left to "they, them or those". The problem in most communities is not that someone is in charge, but that no one is in charge.

These days everyone is busy. For this reason, we have a lot of "special purpose volunteers." These people want to know what, very specifically, they are being asked to do. This new type of volunteer wants to know the specific leadership function we are asking them to perform. The problem is, we often don't know what we are asking people to do.

In the next few days we are going to learn about leadership functions and how to analyze a problem so we can ask people to perform a specific task.

We all know that people resent attempts to trade on friendship — the "friendship trap." This happens when a friend expects you to say yes to a request, because you are a friend. You might be afraid to say no, for fear of jeopardizing the friendship.

This is unfortunate, because research shows that people drop out or will be ineffective if they feel coerced in any way. On the other hand, volunteers who can see clearly where they fit in, what their task is, and how their contribution will be helpful, are the most effective volunteers.

Leadership Functions and Characteristics

Leadership functions are divided into two sets of skills: 1) task accomplishment skills and 2) personal relationship skills. People can be taught to be good leaders. It is also true that there are certain personal characteristics which lend themselves to people developing into better leaders.

EXERCISE: Ask participants to name personal characteristics that they think are important in a leader. List these on the chalk board or flip chart. Proceed with the following lecture material and discussion.

The personal characteristics that may be effective in a leader will vary among cultures. These characteristics will also vary according to particular situations in the same cultural setting. Nearly everyone has the capacity to exercise leadership in certain situations and under certain conditions. However, there are personal characteristics associated with people who persistently emerge as leaders in a variety of situations. These characteristics are: intelligence, a high level of energy, a positive attitude, self-confidence, assertiveness, ability to express feelings, ability to control inappropriate emotions, humor, empathy, openness, and creativity.

Two of these characteristics — intelligence and a high level of energy — are generally considered to be relatively unchangeable characteristics, or inherent. However, it is good to keep in mind that intelligence is important, but only to the extent that an individual is above the average of the group. If the leader is too much above the average, there may be problems with communication. Whether a high level of energy is an inherited trait, or results from personal motivation, or both, is unclear. However, many effective leaders seem to have above-average energy levels.

Most of the other personal characteristics cited here are learned or developed within the environment. They may be difficult to alter, but *they can be changed* through sustained effort. As mentioned earlier, cultures vary in the value they place on some of these personal characteristics. Such variations can be determined only by specific application.

For example, there are cultures in which controlling one's emotions is not desirable in leaders. Leaders are expected to shout and cry and laugh and otherwise freely exhibit their feelings and emotions.

In most North American settings, in addition to intelligence and a high level of energy, the personal characteristics of leadership are: appropriate attitude, self-confidence, assertiveness, expression of feelings, control of inappropriate emotions, humor, empathy, maturity, openness and creativity. These are characteristics seen as useful to leaders in efforts to help groups successfully complete tasks and develop productive relationships.

Attitude

Attitude may be thought of as one's disposition toward other people. Thus, attitude is important to the effectiveness of group action and essential to effective leadership. If the leader is optimistic and cheerful, it is likely that other group members will have a similar attitude, and that productive, willing participation will follow. A negative attitude is likely to result in apathy and dissatisfaction with the task to be accomplished.

Self-Confidence

Confidence in oneself will generate confidence on the part of others. Like a positive attitude, self-confidence is contagious. This characteristic may be one of the most important attributes a leader can possess, and it can be developed.

Assertiveness

The ability to make one's needs and feelings known, without offending, is critical to good personal relations. Assertiveness is essential for good communications and understanding among people who must work together. The greatest difficulty most people encounter is realizing that others do not take offense when we politely but firmly assert our feelings.

Expressing Feelings

People respond to feelings much more sympathetically than they do to factual information. The ability to communicate one's feelings is essential in gaining understanding between and among people. Our society tends to teach us to hide our feelings, rather than to express them. Again, the ability to express one's feelings is a skill that can be learned.

Controlling Inappropriate Emotions

While it is important to express feelings, it also is important to show that one is in control of those feelings and able to deal calmly with the opinions and feelings of others. When one's emotions become dominant, it is difficult to listen to others' ideas and contributions.

Humor

Nothing is as effective as humor in relieving tension and inspiring a cooperative attitude. It, too, can be learned and practiced. As with many other characteristics, self-confidence is a key to developing the ability to see the humor in one's situation.

Empathy

Understanding others is vital to communication. The ability to put oneself in another's shoes is an important step toward understanding. Ask the question, "What would the others do or feel?" instead of, "What would I do?"

Maturity

We think of maturity as seasoned judgement, often based on experience that allows one to respond carefully and deliberately to circumstances rather than impulsively and reactively. We like to think that age contributes to maturity and so we look to you as having this prime quality in your role as leaders.

Openness

The ability to share information and feelings freely and openly provides for a trusting relationship that is essential in interpersonal relations. When a group feels that it does not have all the information it needs, it can become frustrated and lose motivation.

Creativity

The ability to be creative, to look at situations and solutions in a different way, can be learned. If real, long-term productivity is to be achieved, new ideas are needed to allow us to cope with the change that surrounds us.

Task Accomplishment Skills

EXERCISE:	Distribute "Individual Leadership Skills: Task Accomplishment Skills."

(There will be future sessions on this material, but discuss the material briefly and elaborate on it in the lecture in this session.)

In the minds of many group participants, the most important feature of leadership is getting the task accomplished. Tasks may include reaching decisions, planning and implementing programs or projects, aiding personal growth and development, and building group capacity.

Certain task-oriented functions are necessary to group activity when selecting and achieving goals. These functions are: initiating, elaborating, communicating, coordinating, information seeking, content knowledge, information giving, analyzing, diagnosing, summarizing, evaluating, and managing.

Persons who perform such functions are leading the group. These functions may be accomplished by one individual or by several members of the group acting together. A person assigned or assuming a leadership role should be aware of these functions and facilitate their performance.

Initiating

To help the group make progress toward its goals, someone must initiate the discussion of topics and help the group in its transition through various stages of development. Proposing solutions, suggesting new ideas, providing new definitions of the problem, suggesting new attacks on problems, providing new organization of material, or suggesting procedures are all examples of necessary initiating activities.

Elaborating

Elaborating is a way to expand on existing information by clarifying information and giving it more detail. Clarifying includes giving examples or developing meanings. In this task, we are trying to envision how a proposal might work if it were adopted. We are also defining terms in order to eliminate confusion.

Communicating

Effective communication exists between two persons when the receiver interprets the sender's messages in the same way the sender intended. The ability to communicate clearly, and to take into account the feedback that is given, are crucial if tasks are to be accomplished in a manner satisfactory to all involved.

Coordinating

Coordination ensures that group activities move toward a common objective.

Coordination is the process of showing relationships among various ideas or suggestions, pulling ideas and suggestions together, trying to draw together activities of various subgroups or members, and trying to make sense out of the pieces.

Information Seeking

A group must seek information that will help it accomplish a task. This skill encompasses asking for information that is pertinent to the current needs of the group, and seeking clarification of suggestions. Also included is requesting additional information or facts regarding topics raised in discussion. Most of the time we do not have a lack of information, but a lack of knowledge about what is relevant to our situation or problem. We live in an "information society."

Content Knowledge

A sufficient base of understanding on a subject is needed in order to know what information is necessary to deal with a given situation. The leader must have sufficient knowledge about the topic to know when to ask questions, as well as to be able to evaluate the information presented. This is only one of the tasks in the process, but it is often given undue weight.

Information Giving

A leader initiates many group activities, and often will need to provide information as a part of this process. Offering facts or generalizations and relating one's own experience(s) as illustrative of group problems are helpful behaviors.

Analyzing

Analyzing a task is a skill that involves being able to separate the task into various parts and understanding those parts as they relate to the task as a whole. Analyzing also involves the ability to deal with a variety of tasks and group conditions in diverse settings.

Diagnosing

Diagnosing involves identifying a problem and suggesting a remedy, or a way to deal with the difficulty. In diagnosing, one determines the sources of difficulties, suggests the next appropriate step, and identifies the main obstacles to progress.

Summarizing

Summarizing requires the skill to condense material so that it is clear and understandable, as well as making intuitive connections among the mass of information so that new insights may emerge. One aspect of summarizing is pulling together related ideas or suggestions and restating suggestions after the group has discussed them. Another aspect is offering a decision or conclusion for consideration by the group.

Evaluating

Evaluating group activities is a way of understanding how a group is progressing. Evaluation involves submitting group decisions or accomplishments to comparison with group standards, and measuring accomplishments against goals. Evaluating also involves helping the group and individuals within the group to measure how far they have progressed in learning and competencies.

Managing

Managing implies organizing people, as well as tasks. Managing requires foresight and a knowledge of what resources are at hand. Managing is the ability to plan, organize, and make assignments, and to guide the group toward its goal in a manner acceptable to the members.

Personal Relationship Skills

The primary task of leadership is to accomplish some task, project, or program through the efforts of a group. Consequently, personal relationship skills are a necessary part of the leader's repertoire. Personal relationship skills discussed here are: listening, encouraging, providing feedback, praising, questioning, mediating, teaching and training, and maintaining discipline.

EXERCISE: Distribute "Individual Leadership Skills: Personal Relationship Skills."

Listening

Good listening skills are at least as important to effective communication as are good speaking skills. Listening means really hearing what others are saying and accurately interpreting what they mean by their words and actions. Concentrating on the speaker, asking clarifying questions, repeating or reflecting on what the speaker has said, maintaining eye contact and open body language, and smiling are some of the actions that reflect good listening. Listening is an active process that involves hearing, understanding, and relating that understanding through verbal and nonverbal feedback.

Encouraging

Encouraging group members to participate in discussion creates a positive, open situation, and helps the group move from planning to implementation. Some encouraging behaviors needed to develop productive efforts in others include: maintaining a warm, friendly, open atmosphere; praising others and their ideas; and accepting contributions courteously and agreeing that they are important considerations.

Providing Feedback

Providing feedback to a group ensures that information is clearly understood, in the same way, by all group members. Clarifying concepts and information, reinforcing contributions, making sure the information is understood in the same way by all parties in a discussion, are all methods for assuring others that what they have to contribute is important.

Praising

Praising group members for their contributions is one way to encourage an open, participatory atmosphere. When someone makes a contribution to a discussion, recognize it and publicly praise it. The contribution does not have to be usable as it is, but can be accepted and praised as an important consideration. Often, the best ideas "come from left field," and, at first, appear to be unsuitable. Keep those ideas rolling by rewarding people for generating them, regardless of their immediate merit.

Questioning

Questioning helps the leader discover what the group members know and understand. This is a process of eliciting additional information and ideas by asking open-ended questions, or stimulating different perceptions by questioning the existing situation. All avenues should be explored in problem solving. One way of doing this is constant questioning of what is being done and eliciting new information from others. The leader must set the tone of interaction so that everyone feels comfortable asking questions and digging into the topic.

Mediating

Disagreements and conflicts are inherent in settings that encourage everyone to participate and speak out. When wide-ranging discussion occurs and many ideas are generated, disagreements will emerge, and conflicts may occur. A leader must be prepared to help find common ground between competing ideas and actions, and to offer intermediate or alternative solutions. Reinforcing common ground will encourage an integrated response to differences of opinion.

Teaching and Training

Effective teaching can create an environment that encourages learning, and can provide people with skills to continue this learning on their own. Teaching skills to others, by example and by discussion, is a means of improving interpersonal interaction. Providing knowledge and skills needed by the group to improve its productivity and the environment also are important. Creating the environment for learning, and encouraging it to happen, may be the most important teaching functions the leader will fulfill.

Maintaining Discipline

Although encouraging creativity and openness are important goals for group leaders, maintaining discipline is needed to assure that everyone has a chance to participate and to maintain focus in the discussion. Making it possible for all members of the group to participate requires keeping some members limited in the amount of time they consume. Setting a time limit on speakers, keeping the members of a group on the topic, asking reticent members to comment, establishing (with the group) goals for group achievement, and mediating conflict are ways a leader maintains the disciplined direction of the group.

Maintaining discipline is another of the leadership tasks that gets undue emphasis. *Robert's Rules of Order* is essentially a system to maintain discipline. We prefer to look at it as entering into a contract. To start with, we contract with ourselves. We contract on how we are going to manage the group. We are therefore establishing a reference by which to measure our performance. After making a contract with ourselves, we contract with the group.

By contract we can:

- clarify the purpose of the group;
- deal with differences as data or information;
- recognize that there will be differences.

This is what we did, as a group, during our first session. We made a contract and agreed to disagree. If an issue is important, we agreed to expect to have differences of opinion. If this were not the case, we would not be dealing with important issues. And if we are to deal with important issues we need to know all the different points of view.

Sometimes our first thought is to select people for leadership functions with viewpoints similar to our own. We also tend to communicate only with people who agree with us. We tend to create circles of "self-fulfilling ignorance."

There is a difference between closed groups, which ignore other points of view, and a group of supporters that you may want to gather if you are running for public office. These differ from a group that can effectively solve a problem, as we will discuss later.

Finally, we need to listen to people who disagree with us — they may be partially right!

Throughout the LEAR program we will be learning more about both task accomplishment and personal relationship skills. All of you have developed many of these skills to a high level already.

We will also be thinking of leadership as a set of functions which lends itself to a leadership process. Here is an outline of the process we will follow:

1. Develop a vision of a positive future

2. Analyze the situation
    - Identify the issues/problems
    - Gather facts

3. Build a purposeful team to work on each aspect of the issue
    - Involve as much local competence as possible
    - Gather resources
    - Encourage broad participation

This may be entirely different from anything you have experienced before. So hang on, keep an open mind, and let's go!

Chapter 6

COMMUNITY LEADERSHIP: PROBLEM ANALYSIS

by Don Littrell

RETREAT SESSION 1.3 - TWO HOURS

HANDOUTS	Briefing Sheet for Work Session Community Issues Work Sheet Case Study Sample Community Inventory Cards *(See Appendix: Retreat 1.3)*
EQUIPMENT NEEDED	Flip charts and markers for each small group Space for everyone to join a small group

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Lecture

Many people and organizations are concerned with aspects of their community or county. However, there is often considerable frustration generated when people attempt to intervene to do something about a given situation. Too often good intentions and good ideas flounder upon the rocks of unpreparedness.

To increase the potential for successful intervention, people must have a clear understanding of how to investigate a situation and prepare a planned approach that is workable in a given setting. For an approach to be workable, it must be understood and accepted as reasonable by those impacted and by those who will make decisions about the proposal(s).

Values, beliefs and a sense of priorities guide our decisions. Humans have selective perception — we select out information that we already believe and discard the rest. For instance, everyone has advice to give you these days to lower cholesterol. With so much conflicting information, we tend to listen to the reports that agree with our current viewpoint. Judging from the dinner conversations I have been engaged in recently, we tend to ask our friends and relatives what has worked for them, rather than take the time to read the scientific journals or actually make an appointment with a nutritionist. It is the same with other types of information.

Citizens hold the future in the palm of their hands. Citizens are the single most powerful group to influence what gets done. Many leaders underestimate the power of citizens because learning to use this talent and expertise takes time and work.

The role of the leader of today is that of an educator. Citizens need to understand that their quality of life is controlled at the local level. In addition, a leader has to teach people that they have control over their own lives to a much greater extent than they might think. We might ask, what do we get more excited about, our sewer stopping up or a bomb dropping on us? Most people are more concerned about issues that effect their everyday lives.

However, most issues today are too complex for any one person to be in total control of events and outcomes. And yet, we tend to lay total responsibility for decisions upon our leaders. This is why we need to talk about leadership functions rather than leaders. We need a variety of "leaders" to insure that the necessary functions are being performed. This doesn't mean doing it yourself! It means, as a group, analyzing the situation, breaking the problem down into manageable parts and finding people to function in needed roles.

People often become concerned with an issue or problem and feel that immediate action is in order. They jump to prescribe solutions. This is not as effective as working from a thoughtfully considered plan based on accurate information and an understanding of the situation.

Initially people become aware of what might be labeled a "situation" in their community. Such situations may be inadequate child care for working mothers, isolation of older adults, an increase in the school dropout rate, inadequate sewage service, soil erosion, energy costs or inadequate housing. Each of these situations is complex and requires in-depth work and accurate information if it is to be dealt with successfully.

EXERCISE: Distribute the "Community Issues Work Sheet" to all participants. Continue the lecture.

We will use a work sheet to begin to see how to identify pertinent components to problems. All of these critical parts must be addressed or they will surface later to disrupt planned activities.

If we can think of problems as being made up of critical parts, we can take a problem apart, deal with each part in an appropriate manner and then proceed to develop an overall approach or plan. A critical part is that which must be dealt with in order for the issue to be resolved in an acceptable manner. Each part may have to be dealt with differently.

EXERCISE: Distribute the "Briefing Sheet for Work Session," and the "Case Study." Discuss the briefing sheet; continue the lecture.

You do not need specific names to complete the work sheet but you do need to know the position, office or authority that is involved.

Who. Who is going to be effected and who must make the decision? Who are the private or public agencies or organizations which will have to make a decision? Will other groups be affected?

When. When are the decisions made? This question is often ignored. After it has been determined who must make a decision and where it is to be made, timing often becomes important. For example, certain commissions meet quarterly. Others may meet on a weekly basis. If a bond election is necessary, when must the appropriate officials be notified? Answering the "when" of a question often helps to formulate a sequence or priority list of the parts that should be addressed in order to meet various deadlines.

Where. Where are the various decisions formed in the city hall: by the zoning board, or in a state regulatory agency? Will federal agencies have to make a decision? If so, will that decision be made at the local, district, state or federal level? If private organizations are involved, where are their decisions formed? It is important to discover where the decision is made so that the decision source is provided with correct information.

Information Questions. What information is needed and in what form? That which is essential to one decision making structure will be of little importance to another. Legal requirements influence form. Information should be provided to each source in such a manner that it increases the probability that the desired decision will be rendered.

How. How will the decisions be made: by an agency, by an election, in conference, by a group of local officials? Will they be made in a formal or informal manner? If solutions meet certain criteria, will they be automatically approved? Knowing how a decision is made or how it is usually made provides a clearer insight to guide the manner in which one proceeds.

Responsibility. Who will take the responsibility for working on the various parts or sub-parts? People working on a problem or issue often have a tendency to assign responsibility before the task is clearly understood. This may be why people are sometimes reluctant to participate. They are uncertain, as is the group doing the asking, exactly what the task is and what is expected. By having a clear concept of the various tasks to be performed, a more effective job can be done in matching interests, resources and competence with the task to be carried out.

Strategy. Strategy questions ask how the task will be performed. It is important to develop a specific approach or plan for each task or for each critical part or sub-part. The person or groups accepting responsibility for a task should, by all means, develop a written statement of how they plan to work and when the task should be completed.

Resource. What does it take to get the job accomplished? What resources will be necessary to carry out the task and how will those resources be accessed? These questions are important to our understanding of what will be needed to reach our aim.

EXERCISE:

Ask participants to break into groups of four to five and find a section of the room where they can work. Provide a flip chart and marker for each group. Working in their groups, ask participants to complete the work sheet using the case study. Ask the groups to identify a few critical parts of the issue presented in the case study. List these critical parts in the left hand column and then start to answer the questions for each part.

Ask each group to report on one of the critical parts. The groups could rotate in recording the issues reported for each section (who, when, where, etc.) so that you have a flip chart for each section.

Discussion Issues from the Work Sheet

Analyzing the Problem

In the beginning, it is essential to get a sense of the big picture. We must get a sense of what work has to be accomplished so it can be broken down into tasks. Talk to people about what needs to be done so that the group can begin to see which people have the skills, ability and willingness to perform different functions.

Going through a process like this has the potential of helping people learn how to deal with the situation at hand. It also leads to insights into how to approach other situations. It can create the realization that ordinary citizens can deal with complex issues. People can see how their ideas contribute to the overall effort. A record of progress as well as stumbling blocks can be maintained. This helps people realize that progress is being made. This is important, especially in extremely complex issues which require considerable time (sometimes even two or three years) to address.

Through a thorough analysis of the problem, the stumbling blocks can be dealt with more effectively. It may be that an approach will have to be changed, or it is determined that the original strategy is not workable. It may be that the group will discover, upon investigation, they want to change direction or alter their goal. By maintaining an open planning approach, new information can be taken into account and utilized as it is developed or found. This type of system assumes that people may want to change as they gain new insights. It provides a way to deal with such changes.

Getting People Interested

One well written handout on the big picture will pique the interest of individuals. Then, as an educator of the group, you can verbally tell members how they fit in. Many people won't attend a public meeting, but they will do one piece of the work or one task that they enjoy.

As mentioned before, everyone is busy today. People have to make choices about how to spend their time. A lot of people won't make long-term volunteer commitments, but they will work on a specific task. This community issues work sheet is a good to way to start to analyze a problem or issue. It helps people realize the importance of what is going on in the community.

Power of the Citizen

The case study points out that the people have the power. This was a real situation and this group, because of their interest, accomplished a good deal. Realize that you have more complete freedom as an individual than many paid officials. Citizens have more freedom and absolute influence because they are not chained to a job description, as a government official may be. Elected officials have constraints because of their constituencies.

Local Competence

As a community, we have been taught to look for external solutions to problems. We always think we have to "call in the experts" when we probably have the competence among ourselves. We have equated "local" as not competent and "outside" as competent. This is not true. We must get back to the idea of local competence. Local people are able to solve their problems on the local level.

To illustrate this point, we will do another exercise.

EXERCISE: Ask participants to return to their small groups. Instruct the participants to think about all the services provided locally. Ask each group to list these on a flip chart. Each group can report the services they know about. Have each group add items to their list as new items are mentioned.

Discussion Points

Multiplicity of Services at the Local Level

Look at these lists and think about the local government and all services that can be influenced at the local level. Government is not something far away, out there, at the state capitol or in Washington, D.C. It is here and we can influence it. We study our national government in school, but, for the most part, neglect the local level. What happens at the local government level is often, though not always, more important in our day-to-day lives than what goes on in Washington. In many school districts children are taught very little about their local governments. Radio and television news broadcasts give more national and state news than local news, especially in rural areas where the stations are located in the metropolitan areas.

Most rural and small town services are run by VOLUNTEERS!

In most of non-metro America, many public and social services are run by volunteers.

EXERCISE:	Ask participants to list their own volunteer services: city council member, school board member, volunteer fire department, volunteer ambulance service, etc.

Volunteers have to deal with very complex issues. The regulations that are imposed on some of these services are becoming increasingly complicated. For example, city sewer boards have to deal with a greater amount of waste items and they must determine proper ways to dispose of waste. Think of the current controversy in many communities about landfills. Think of all the volunteer fire departments. Being a fire fighter is a complex profession. A fire fighter must know about chemicals, the laws of physics and be a human relations expert, etc.

It becomes obvious that we need more specificity in volunteer assignments. Each person can become their community's expert on something. We need to provide opportunities in small communities for people to do their own research studies to see what works and what is needed in their community.

Community Inventory

EXERCISE: Distribute the "Sample Community Inventory Cards."

The community inventory is something you, as a leader, can do. It will prove to be a very useful tool. Some communities do this more formally when the Welcome Wagon interviews new residents. In other communities the utility companies may ask newcomers to fill out an interest and ability inventory. This inventory will give you a record of residents' skills and talents. It will allow you to ask the right person when you need a specific task completed.

With the community inventory cards you have the ability to deal with people on their terms, talking about their interests. You have the ability to bring people together based on their "articulated interests." This type of list gives you a tool to listen, give feedback and communicate with people based on their interests. You can send them articles or news tidbits, ask their advice on different matters. What do you think of people who ask advice of you? It generally makes you feel important and valued. You can give that same feeling to others. And when you need to ask them to work on a specific project, the groundwork will be laid for their willing participation.

This gives you a power base to work from which can move the community. Leadership has as its base, the manipulation of power. The word "power" has been a no-no in the past. Here we are talking about a positive manipulation to accomplish good things in the community.

We are really talking about building trust. Building a trusting community or organizational climate is very difficult. The tools discussed in this session will help you build the trusting atmosphere you need to accomplish goals.

Chapter 7

COMMUNITY LEADERSHIP: BUILDING TEAMS

by Don Littrell

RETREAT SESSION 1.4 - TWO HOURS

HANDOUTS	Looking At Capacity, Not Deficiency. Felt Needs and Anticipatory Needs: Reformulation of a Basic Community Development Principle. *(See Appendix: Retreat 1.4)*
EQUIPMENT NEEDED	Flip charts for each group Flip charts from session 1.3 Blank paper for participants to write on

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Lecture

This session will involve more exercises with the Community Issues Worksheet completed in the last session. Have the flip charts from Session 1.3 on hand.

At the local level, we can build purposeful groups to work on projects, to serve on advisory boards and to give guidance to all the sectors of government we identified in the last session. We have, at the local level, all the competence to advise on these issues. Do you believe this?

Our Own Individual Skills

EXERCISE:	Instruct the participants to take a sheet of paper and write down everything they know well enough to teach someone else. It can be anything from tying flies for fishing to organizing a major benefit ball. Take 5 minutes. Ask each participant to read his/her list. Comment on the wealth of talent available in the group present.

Team Building

When we want something done in our group or community we usually start by saying, "Who can we rope into this?" We tend to find people we know, whom we are comfortable with, and ask them to help us with the job. This may not be the best group to get the job done. If we have analyzed the problem and broken it down into components, then, armed with our community inventory cards, we can put together a purposeful team to do each component of the task.

You may not need to get members together for meetings! If each part of the task is clearly delineated, each team or individual can do their part and only the steering committee will have to meet. To do this effectively, we need to know what abilities and skills will be needed. We need to know what talents and interests exist in our area and/or what information and resources people can access.

Deficiency vs. Capability

We are accustomed to asking what the needs in a community are, rather than what capabilities the community has. We have been approaching community leadership from a deficiency standpoint rather than a capability standpoint.

When we look only at our deficiencies, this sets up the pattern of trying to correct the deficiency rather than looking at what is working and building on strengths. The article by John McKnight (1985), "Looking at Capacity, Not Deficiency" describes a neighborhood that looked at its capabilities rather than deficiencies. This group surveyed their capacities, then conducted a demand study and soon had neighborhood people working at tasks.

The McKnight method is based on community development theory which is often used in Third World countries. The idea is to look at what we have now: what it is people want. This becomes the starting point for development activities. This gives the people a voice in developing their own community. It builds their capacity to solve their own problems.

Another author, Jerry Wade (1989), in his article "Felt Needs and Anticipatory Needs: Reformulation of a Basic Community Development Principle," argues that we should do away with "needs assessment," because this method is based on mistakes of the past. If we only concern ourselves with correcting the mistakes of the past, we are limiting ourselves to a future that is just like the past, minus the mistakes. Instead, we need to look at "anticipatory needs," in order to keep our eye on creating the future we want.

Considering all the talent we have right here in this room, imagine the wealth of talent in our communities, just waiting to be used. We will now do a couple of exercises to illustrate this.

EXERCISE:	Using the case study from last session, ask the group to come up with a list of competencies and abilities needed to deal with this situation. Instruct the participants to re-form into the same small group that they were in the previous session. Using your Community Issues Worksheet, make a list of the type of skills or the types of competencies needed to solve this problem. (For example, legal skill, water pollution expert, a good public speaker. List the

skill needed, not the person or the position title.) Have each group put their list up on the flip chart. Compare, add, and discuss the reasons certain skills are needed.

EXERCISE: Ask participants to go to each chart and put an X by the competencies that they have. Ask them to put a check mark by the competencies they know someone else has that they could ask to help. Have everyone return to their seats and look at the charts. (Usually all of the competencies are marked.)

As you look at all of the skills, talents and competencies that we have, or know of someone who has, you can see the capacity of this group to solve the case study. Think of the wealth of community resources right here. And just think what you would find if you did this kind of inventory with other groups you know about.

Communities and community groups always seem to underestimate the knowledge and resources they have. We don't think of ourselves or our community as a knowledgeable resource. We need to take the time to ask people for their assistance. We may be very pleasantly surprised at the multiplicity of talents available to us. Especially in a retirement community, there are many talented people who have skills that can be used to benefit their community.

We know that we need volunteers to do fairly sophisticated and professional work. We also know that the information now available to communities is fantastic. There are data bases, computer information systems, trend letters, government statistics, all available to communities and groups, if we know how to find them. Volunteers can become researchers for their groups.

Retired people can meet the un-met needs in a local government or service group. Good city managers are using citizen task groups in a surprising number of very sophisticated ways.

It becomes obvious that we don't need to create the expectation that the elected official is the "expert." We can expect a team of local citizens to be experts in certain areas. Have you noticed that issues fail if there hasn't been input from local people? Local "experts" can work with outside experts and build a team with much more credibility in the community.

To Be Effective, Teams Need:

- ***Purpose.*** Consensus on a shared vision, policy, or course of action
- ***Procedure.*** Rules and agreement on how we are to proceed
- ***Analysis.*** Units of work identified and parceled out
- ***Management.*** A coordinated feedback system
- ***Evaluation.*** As an ongoing process through all the steps (Don't wait until the end if the process isn't working.)

Chapter 8

LEARNING HOW TO LEARN: RAISING THE CONFIDENCE OF OLDER LEARNERS

by Carol Schultz and Elvis Clark

RETREAT SESSION 2.1 - ONE HOUR

HANDOUTS	Note-Taking With T-Notes Perceptual Learning Styles Inventory Perceptual Learning Styles Scoring Sheet Perceptual Learning Styles *(See Appendix: Retreat 2.1)*
EQUIPMENT NEEDED	Chalk board and chalk or flip chart with markers
SUGGESTED READING	Keirsey D., Bates M. (1984). *Please Understand Me: Character and Temperament Types.* Del Mar, CA. Prometheus Nemesis Books. Palmore, E. (1981). The Facts on Aging: Part II. *The Gerontologist.* 21(4): 431-437. Palmore, E. (1977). The Facts on Aging: A Short Quiz. *The Gerontologist.* 17(4): 315-320.

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Lecture

Outlines for sessions on note taking and discovering learning style are included. Other suggestions for this session are to:

- *Administer the Myers Briggs in preparation for Session 4.2 (which may be found in Keirsey and Bates (1984).*
- *Have an expert on memory cues or mnemonics give a session.*
- *Have someone versed in "superlearning" share some techniques.*
- *Administer a quiz like the Palmore "Facts on Aging" to allow participants to discover stereotypes they hold about themselves, (located in Palmore articles, listed in Suggested Reading).*

Research shows that older adult learners often lack confidence in their abilities. They have often been outside of formal learning situations for years. They may doubt their ability to retain and understand information. This session is designed to meet the needs of older adult learners.

Taking Notes

"Even the shortest pencil is better than the longest memory." Note taking is a valuable tool for people engaged in many kinds of activities. Why do we need to take notes? Some of the material we will cover in these sessions is given in handout form, but other details and information revealed in discussion will also be valuable. You may wish to remember this information. Having a good system of note taking is essential to your success.

Most students take notes so that they will have a better chance at recall for a test. Others take notes so that the specific information can be remembered, or the general information reviewed after the class, speech or presentation is over. Your notes need to have three characteristics if you want to use them for study or any future use. They need to be organized, accurate and flexible. The method of note taking we are going to teach you fits all of these criteria.

First, we will identify the types of note taking you are probably familiar with.

Cover the Page. This occurs when you write down everything the speaker says. You fill each page solid with writing, often without paragraphs or any headings at all. The disadvantage of this type of note taking is that it is not organized or flexible. You may be so engrossed in getting everything written down that you miss what the speaker is saying.

Outline. You carefully try to get your Roman numerals, capital letters (ABC's) and your numbers and lower case letters in proper order. But the speaker doesn't always proceed this way. Is this point capital letter B, or is it number 3, small a? The truth is that most speakers aren't so well organized, and it is difficult to take outline notes of such presentations. This is the note taking method that you were probably taught in high school English class and, it probably never worked for you.

Spider Web. With this method, you write the central idea in the center of the page, and write down related points on lines coming out from the center. Sub-points are indicated as new branches on the lines. This is very effective for someone who is more visual, but it may be hard to reinterpret later.

EXERCISE: Distribute "Note-Taking With T-Notes" by Archie Davis and Elvis Clark. Using the handout, go through each step.

Let's practice using the T-Note system while I give a mini-lecture about goal setting.

First, we will put the date and the topic in the right hand corner of our page. Then draw a big T on your notebook paper.

Everyone is talking about setting goals these days. Many people set goals but they never achieve them.

> The main topic or title of this talk should be written at the top of your page. We can entitle this, "Goal Achievement."

I'm going to give you three steps which help in goal achievement.

> On the left hand side of your page, write "3 steps to achieve goals."

These three steps are to (1) visualize, (2) verbalize, and (3) vitalize.

> Write these three words on the right hand side of your paper.

What do I mean by visualize, verbalize and vitalize?

> Label this next section on the left "definitions". Write the words visualize, verbalize and vitalize on the left, and the definition opposite it on the right.

To visualize is to picture a goal in your mind. See yourself successfully achieving the goal. If it is a goal to do something, see yourself successfully doing this. Picture the completed project.

The second step is to verbalize. Tell someone what your goal is. Outline for them the steps you are taking or will take to accomplish this. There is something about telling someone else what you intend to do that keeps you working. You want to let them see that you can accomplish what you set out to do. Or you may want to avoid the embarrassment of having to answer their questions about your progress.

The third step — vitalize — means to start action. No matter how small, each action step taken is one step closer to the achievement of your goal. We do a lot of things that sabotage our own success. There are four sentences that seem to prevent personal growth.

> On the left you should write, "Four sentences which prevent personal growth."

The first sentence is: "That's me." Whenever you let someone else define you, especially in a negative way, you are dragging yourself down. The second sentence is: "I've always been that way." The third is: "I can't help it." And the fourth sentence is: "That's my nature."

> These four phrases will be listed on the right hand side of your paper.

How do these ideas inhibit personal growth?

> On the left you would write, "How do they inhibit personal growth?"

They imply that a person can't change, that they are stuck.

> Now let me give you this comment, which goes on the right of your page: "Eliminate these sentences from your vocabulary and you will help your goal achievement."

(Review the T-Note process with the participants. Discuss how much easier it is to decipher the notes they have just taken.)

In summary, notes do help. The T-Note system is one which may help you feel more confident that you will remember the important facts which prompted you to take notes in the first place.

Discovering Your Learning Style

How do you learn best? Experts in the field of learning theory have identified specific learning styles that vary greatly with each individual. Learning style refers to the preferred way that people process, transform and grasp information. You may use different styles for different tasks. The place where learning is taking place and the way the teacher or facilitator is interacting with you has a bearing on how much you learn.

Generally speaking, learning style can be examined from three broad perspectives: cognitive, affective and physiological. The cognitive aspects of learning style relate to the way a person processes, decodes, encodes, stores, and retrieves information. Affective aspects of learning style include emotional and personality characteristics related to motivation, locus of control, interests, persistence, responsibility and sociability. Learning style examined from a physiological aspect relates to sensory perception and environmental characteristics.

It is the physiological aspect of extracting information from the environment by the senses that we will look at today. This learning style is called the perceptual learning style and is composed of seven elements, that we will now describe.

Ask the participants to think about the questions that follow. There is no need to keep track of the answers now. Their increased awareness helps them complete the Perceptual Learning Styles Inventory which follows.

Questions Related To Perceptual Learning Style Identification

Questions Related to Identifying Strong Perceptual Elements		Questions Related to Identifying Weak Perceptual Elements
Print		
Do you remember quickly and easily what you read?	or	Do you have to read articles several times before grasping the important concepts?

Can you learn something after seeing it or after writing it?	or	Do the words on the page all seem to run together?

Aural

Do you tend to remember and repeat those ideas you heard verbally presented?	or	Do you find it difficult to remember information presented in lectures?
Do you "hear" what others are telling you?	or	Do audio tapes leave you wanting to read the information?

Interactive

Do you like to use other people as sounding boards?	or	Do you find that you do not get much information from small group/discussion activities?
Do you enjoy question/ answer sessions or small group discussions?	or	Would you prefer not to discuss things with others, preferring instead to work alone?

Visual

Do you need to have a "picture" in your mind before comprehending something?	or	Do visual representations such as graphs or tables leave you wanting an explanation?

Do you "see" what others are trying to tell you?	or	Do you find it difficult to picture things in your mind?
Do you create visual images as you think?	or	Do you fail to understand displays or charts?

Haptic

Do you feel that you have to touch the new things you are learning?	or	Do you feel it difficult to distinguish the feel of different items?
Are "hands on" experiences important to you?	or	Does touching objects fail to create a visual image in your mind?

Kinesthetic

Do you think you learn better when you are able to move during your learning?	or	Do you find movement distracting?
Do you like to move your hands (knit, crochet, doodle) while learning, not from boredom, but because it helps you concentrate?	or	Is it hard to concentrate on learning something if you are also moving or doing something else?

Olfactory

Does smell have any special significance for you?	or	Do you find smell basically offensive?
Can you associate a particular smell with specific past memories?	or	Do smells detract from your learning?
Are you frequently able to identify smells?	or	Do you find it hard to distinguish between different smells?

EXERCISE: Distribute the "Perceptual Learning Styles Inventory" and the scoring sheet. Discuss the learning styles using the hand-out "Perceptual Learning Styles."

Chapter 9

EFFECTIVE INTERPERSONAL COMMUNICATION

by Murray Hardesty

RETREAT SESSION 2.2 - TWO HOURS

PREPARATION	Transfer overhead master "People Communicate Through Screens," to a transparency. Copy and cut the "List of Filter Messages" into strips so that one message is on each strip of paper. During the exercise, these will be taped to the foreheads of participants. *(See Appendix: Retreat 2.2)*
EQUIPMENT NEEDED	Masking tape Chalk board and chalk or flip chart and markers Overhead projector
OTHER MATERIALS	Collect pictures of people which can be used to show the concept of "symbolic communication."
FURTHER READING	Powell, J. (1969). *Why Am I Afraid to Tell You Who I Am? Insights on Self-Awareness, Personal Growth and Interpersonal Communication.* Chicago: Argus Communications.

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Lecture

Older adults have years of experience communicating. So you may wonder why we are having a session on communication. I believe that we are never finished learning about communication. Each person you encounter is a unique individual. I believe that everyone can learn to be a more effective communicator.

I'm asking you to be non-judgmental for a few hours. Sit back and go with the flow. I may ask you to do some silly things but it is all to learn more about effective communication, and have some fun while doing it. This is experiential and experimental learning — relax and let's have some fun.
I want you to go on a head trip with me. What does this mean to you?

(Elicit responses from the group, some may think about drugs, an intellectual trip, a guided visualization, etc.)

We now have our first example of communication that means something different to everyone.

Becoming Aware of Our Screens

USE OVERHEAD: "People Communicate Through Screens"

	Personality Attitude	
Person A	Values, biases	Person B
	Belief systems Experiences Assumptions	

All of us have screens or filters through which we see the world. These screens are our personalities, attitudes, values and biases, belief systems, experiences and assumptions. For example, when I mentioned a "head trip" you could only respond to that from your experience. You then assumed that I meant a certain thing and you may have judged me based on your value system.

Communication has to be filtered through two screens before the message can be received. It has to be filtered through both the sender and the receiver. And as you know, there is much more to communication than verbal communication. There are verbal, non-verbal and symbolic types of communication. We will learn about all three of these.

Effective communication is difficult. The better we understand what goes on when people communicate, the better our chances for becoming better communicators.

The Head Trip

We are going to do an exercise to help you experience, in a real situation, what it is like to communicate through a specific screen or filter message, and to be communicated with through a screen.

EXERCISE: Give each participant a piece of masking tape. Instruct them to place the tape on their forehead. Make the tape into a circle so that it is sticky on both sides. Then place a small piece of paper on each person's forehead. (Each piece of paper will identify one of the common filters through which people communicate. These should be prepared in advance from the "List of Filter Messages.") Instruct the participants to mill around, read the filter message on another person's forehead, and communicate with the person in that way. Participants should spend two or three minutes with a person, then go on to another person. Continue to have the participants mill around for 15-20 minutes. Have everyone sit down. Ask people to guess what the filter message on their forehead says. Write the messages up on the flip chart as people guess. When everyone has guessed, ask participants to relate their feelings and reactions to the exercise.

This exercise applies to real life because we often don't know what our filters are, much less, what the other person's are. Most of us have more than one filter. We have to discover our own filters and pick up clues about other peoples' to have effective communication.

As you probably already realize, communication is a very complicated matter. Effective communication involves your self-concept, the other person's self-concept, careful listening, clarity of expression and the ability to trust others. We will look at some of these components of effective communication.

Components of Effective Communication

Self-Concept. Your self-concept involves who you are, what you are, how you think about yourself. The stronger your self-concept the more effective you are as a communicator. With a strong self-concept you are not afraid to interact and share with others. You don't worry about how others see you.

Listening. This is not simply hearing. Listening is the integration of the words we hear. It is attaching meaning to the words and then being aware of the way we feel about what is being said.

Clarity of Expression. This relates to expressing, in words, what we think or feel about an issue and having our body language congruent with our words.

Self-Disclosure. This ties into the amount of trust that you have in the group. It is related to your self-concept. It involves giving personal information about yourself. We have to be able to share our real selves with someone else before we can have a real sense of ourselves.

(For example you might use a self-disclosure statement such as, "I was really scared that this session might not go well.")

The book, *Why Am I Afraid to Tell You Who I Am?* by John Powell (1969) is good to read to understand more about this idea.

If we look at leadership as a set of task accomplishment skills and personal relationship skills rather than as one person performing a public role, we can see that we don't have to be perfect in every area. We can admit that we don't know, that we are afraid or overwhelmed. If you are performing the leadership role, as we are defining it, you will have a whole team of people helping you, supporting you and filling-in with their skills and expertise.

Modes of Communication

The primary modes of communication are (1) symbolic communication, (2) verbal communication, and (3) non-verbal communication.

Symbolic Communication. This is a very strong and powerful means of communication. It is commonly referred to as "first impressions." It is the communication rendered by what a person is wearing, a group you are identified with, your hair style, etc. It causes people to make assumptions and draw stereotypes based on appearance. The long-haired hippies of the 1960s and dissidents with black arm bands are examples. Symbolic communication can be misinterpreted and is often misleading.

EXERCISE: To help participants relate to this, the facilitator might distribute pictures of individuals and ask participants to make assumptions based upon the symbols represented. For example: a "dirty old" man, a "Hell's Angel" dressed in black leather, a "distinguished" gentleman, etc. Ask for descriptions of situations where a person turned out to be totally different, once you got to know him/her.

Verbal Communication. This form of communication is the one most relied upon. Problems arise because words have different meanings to different people. Meanings differ for people because of previous experiences, local jargon, ethnic meanings, physical ability to hear, and specialized vocabularies. Some words like power, control, conflict and disagreement may have emotional connotations for some people. Anyone who has been to Great Britain or other English-speaking foreign countries can probably relate stories about the surprisingly different meanings of words.

Non-verbal Communication. Some people believe that this is the most honest form of communication since most non-verbal communication is done on the unconscious level. "Actions speak louder than words." This involves posture, facial expressions, tightness in parts of the body, tone of voice, etc. We will look at non-verbal communication in more depth in our next session.

Chapter 10

NON-VERBAL COMMUNICATION AND HOW TO LISTEN EFFECTIVELY

by Murray Hardesty

RETREAT SESSION 2.3 - TWO HOURS

HANDOUTS

For *half* of the participants prepare:

Poor Listening Habits: ABC Listening Sheet
Poor Listening Habits: NL Sheet
Poor Listening Habits: No Eye Contact

For *all* of the participants prepare:

Poor Listening Habits: Separate Conversations
Poor Listening Habits Theory Sheet
Poor Listening Habits: Effective Listening Sheet
Non-Verbal Communication (stick figure)

ADDITIONAL HANDOUTS

Classifying Levels of Listening and Responding
The Art of Listening

(See Appendix: Retreat 2.3)

EQUIPMENT

This session requires space for the participants to walk around. Since it may become quite noisy, a room where this will not be a problem is recommended.

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Lecture

Non-Verbal Communication: Two Considerations

1. Non-verbal communication is usually involuntary; therefore, it is often considered a more valid source of communication. The receiver is always attaching meaning, right or wrong, to non-verbal messages. Communication is incongruous when non-verbal clues -often called "body language" - are saying one thing, but verbally the person is saying something else.

(Give some examples of mixed messages and body language, such as aggressively saying, "I really care for you," or walking in a dejected manner saying, "I'm wildly happy.")

2. Like all other forms of communication, non-verbal communication can be misread. Gestures may mean different things in different cultures; people with different abilities (eyesight, hearing) may misinterpret them. For example, in Native American cultures, it is impolite to look an elder in the eye. However, in Oriental cultures, looking directly at one's elders is considered extreme politeness. What is considered a comfortable distance from a person also differs from culture to culture.

Non-verbal Communication Includes:

- Ambulation, how one carries the body
- Posturing, sitting position
- Touching (this can be the most powerful and the most threatening)
- Eye contact

- Gesturing
- Vocalism, tone of voice, volume

We will now practice some of the non-verbal modes of communication to give you an idea of how important it is.

EXERCISE: *Instruct the participants to perform as follows:*

1. Shout at me without using your voice.
2. Yell from the bottom of your lungs because the team has just won.
3. Find a partner, decide which person is A and which is B. Do these exercises:

a. Person A makes noises that person B mimics (mmm, ahh, oow). Then switch roles.

b. Person A starts talking, B communicates non-verbally that he/she has to go. Then switch roles.

c. Person B starts talking, A communicates non-verbally, that B has a nose bleed. Then switch roles.

d. Person A is sitting and listening to a speech but is very bored. Person A communicates this non-verbally while B mimics. Then switch roles.

Now instruct the participants to get up and begin milling around in the back of room.

e. Say hello to each other person non-verbally.

Instruct the participants to find a partner and again designate one as A, another as B. The following exercises can be done with the same partners or with a new partner for each interaction.

f. B pretends to be shopping in a store where the clerk has given the wrong change, A mimics.

g. Person A thinks of three sentences about something of interest to him/her, then verbally shares the sentences with B. B does not keep eye contact. Then switch roles.

h. Person A tries to verbally explain how to get to a place without using his/her hands. Then B must repeat the instructions, also without using his/her hands.

i. A and B stand about 10 feet apart, start a conversation, then start moving in until their noses touch, still talking, they move back to the distance that feels most comfortable.

Have all participants return to their seats and discuss the experience.

What verbal and non-verbal clues were used? *(List these on a flip chart.)*

What was the most uncomfortable thing you had to do? The most comfortable?

What was your comfortable distance from your partner (exercise i)?

Summarizing Non-Verbal Communication

EXERCISE: Distribute the "Non-Verbal Communication (Stick Figure)" to use in summarizing.

From these exercises we have learned that we are all communicating, all the time. It is important to talk about non-verbal communication because each person may interpret non-verbal communication differently. We know that we must checkout our perceptions with the other person. If we do, we will lessen the chances of misunderstanding and misinterpretation.

How to Listen Effectively

To get a better idea of what *good* listening is, we are going to first practice *poor* listening.

EXERCISE: *Instruct the participants to find a partner and sit facing each other. Decide who will be A and who will be B.*

1. Person A receives the instruction sheet "Poor Listening Habits: ABC Listening Sheet". As your partner is talking, keep track of the total number of words he or she uses that begin with A, B or C. B will not know what A is doing.

2. Person B receives the instruction sheet "Poor Listening Habits: NL Sheet". As A is talking, B will do his/her best not to listen in any way.

3. Person A receives the instruction sheet "Poor Listening Habits: No Eye Contact." Person A will carry on a conversation without making eye contact while B is speaking.

4. A and B both receive the instruction sheet "Poor Listening Habits: Separate Conversations". Both A & B will talk about their own thing, not responding to their partner's topic in any way. They will carry on their own one-sided conversations.

Reassemble into a large group. Discuss how each situation felt to each person.

Communication only takes place when there is a sender and a receiver. How can I improve my communication? *(Elicit responses from the group and list the items on the flip chart.)*

The role of the listener is to ask questions, which will draw out thoughts, and give feedback.

EXERCISE:	Distribute the "Poor listening Habits Theory Sheet" and the "Poor Listening Habits: Effective Listening Sheet." Discuss each as it relates to the session. Distribute "Classifying Levels of Listening and Responding" and "The Art of Listening," for further study.

Chapter 11

DEVELOPING FACTS AND INFORMATION

by Don Littrell

RETREAT SESSION 2.4 - TWO HOURS

PREPARATION	Transfer these overhead masters to transparencies: Assumptions About Communication Some Reasons for Resistance to Change Conditions Which Have Been Found to Lessen Resistance to Social Change *(See Appendix: Retreat 2.4)*
POSSIBLE HANDOUT	A listing with addresses and telephone numbers of the places where information can be found in your community.

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Lecture

Facts for the Future

What is a fact? What is truth? What makes a fact a fact? We make a fact a fact by whether or not we think it is so. If someone rejects a piece of information, it is not a fact, for that person.

Our preferences, values and beliefs determine what bits of information we choose to call "facts." We accept these bits of information as facts regardless of what science tells us. For instance, think about what you consider the facts about smoking and dieting.

"If people just had the facts they would..." Even with the same information people wouldn't come to the same conclusion. People have information, but assume it has no relevance for them. Until there is some personal connection, people do not pay attention to the facts.

The context determines the level and type of communication needed to get the facts across. If you are in a community group or working on a project, don't keep spelling out the facts. You must make the information meaningful and relevant to the audience you want to reach. And remember, people will create their own information if you don't get them the correct information.

ON OVERHEAD: **Assumptions About Communication (often hidden) That May Lead Us Astray**

1. **We tend to assume that what I say = what you hear.**
2. **We tend to assume that we can know what something really "is."**
3. **We tend to assume (or at least talk as if) the world "out there" is static.**
4. **We tend to assume that the world "out there" falls into the categories we have in our own language.**
5. **We tend to assume that things labeled alike can be treated alike.**
6. **We tend to assume we know when we are actually making inferences.**
7. **We tend to assume we already understand each other.**

We can no longer shrug our shoulders and say you can't change people. In fact, people *like* change. What they resist is the *methods* managers use to put change through.

(Discuss this.)

ON OVERHEAD: Some Reasons for Resistance to Change

1. The purpose for the change has not been made clear.
2. People have not been involved in the planning.
3. The appeal is based on personal reasons.
4. The norms and habit patterns of the community are ignored.
5. There is poor communication regarding change. When people don't know, they vote no. Single purpose volunteer organizations trap themselves in this one.
6. There is fear of failure. Provide the opportunity for people to learn. Remember, as we discussed, most people would rather plead lack of interest rather than ignorance or fear. Fear of failure is one of the great fears that may be operating here.
7. The "cost" is too high or the reward for making the change is seen as inadequate. This can be emotional "cost," as well as monetary cost.
8. The present situation seems satisfactory. The community involved does not see this as a problem.

What is proper? We have to consider how much risk are we asking people to take in their "proper" zone. The old stereotypes about what is proper for men and women to do, or how a dignified older person should act, need to be reconsidered. However, we must understand that people have a margin of risk they can tolerate. We tread on shaky ground when we go beyond their limits.

A fact may be embedded in the social history of a community. Many communities have barriers that exclude some people from participation — barriers of race, age, sex, class. We have to ask ourselves what we have been taught, and what we have taught ourselves, about others in the community.

Each person needs to ask him/her self: Am I locked into one way of thinking and doing things, or am I willing to look at new ways and experiment with new thoughts and feelings?

ON OVERHEAD: Conditions Which Have Been Found to Lessen Resistance to Social Change

1. People need time to consider that change is needed, so no one feels that something has been put over on them.

2. Change comes more easily when there is some provision for people to blow-off steam; don't move ahead so fast the opposition doesn't have time to organize.

3. Motivation affects a person's willingness to be an effective human resource. Resistance may be reduced if these factors are considered:

    - meaningful reward
    - relationship
    - importance
    - initial success
    - opportunity to grow
    - appropriate involvement in decision making

4. Be sure people know the goals and the reason for the change.

5. Build a trusting community climate. Mistrust arises when people have inadequate and incomplete information.

Managers vs. Leaders

"Managers do things right, leaders do the right thing." We want you to be leaders for the future, doing the "right thing" to make your vision of the future a reality.

Sources of Information

EXERCISE:	Where do you get information? This can be conducted as a brainstorming session, or you may prepare some handouts with the addresses and telephone numbers pertinent to your own community.

Telephone Book. The *Yellow Pages* are a valuable source of information. Some have local, state and federal agencies listed in a separate section. There is a federal information hot line.

Extensions Offices. Many local offices are computerized and can access national, state and specialized data bases.

Soil Conservation Service. This office has detailed maps of the community and often maps of development in specific areas.

Public Library. If you are near a large library, it may be the repository for government documents. If it is, all of these documents can be borrowed. Most community libraries are connected to an inter-library loan system, which allows access to any published material.

Elected Officials. State and federal legislators can access their research resources for you. They often have access to publications that local community people may use.

Foreign Embassies. The staff of foreign embassies can obtain information about crops, imports, trade and economic opportunities. These are not unbiased reports, of course, but some are useful.

Public School System. Each person in the school system has a network with professionals in their field. Some schools are lifelong learning centers where adults can be involved in all kinds of learning and information retrieval.

Local Newspapers. Each newspaper keeps a "morgue" of articles pertinent to certain issues. Through back issues, you may find historical documentation of a problem's development.

Historical Society. This group can give important historical and social references, help identify powerful family groups and help in understanding traditional values.

Private Organizations. Banks, savings and loans and other financial institutions have well developed information networks.

New Players. Rural Electrification Associations have satellite dishes.

New Roles for Volunteers

Technology will, increasingly, make information from world-wide sources available to volunteer community groups. Access to information is exploding. In the past, the problem was finding information. Today, there is so much information, the problem is sorting out what is useful to us. There is a wealth of data available, but it takes work to turn this into useful information. To complicate matters, the life span of information is getting shorter and shorter.

This situation creates new roles and tasks for community volunteers: the sorting, packing and integration of the information into useful packages.

This puts people like you in a different relationship to the bureaucrats. You must recognize that accessibility to information is power. You are no longer dependent on bureaucracy for access to information. Information control is one of the tools of power!

Chapter 12

VISIONARY LEADERSHIP: LEADERSHIP STRATEGIES FOR THE FUTURE

by Don Littrell

RETREAT SESSION 2.5 - TWO HOURS

EQUIPMENT	Flip chart with markers for each group

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Lecture

Visionary leadership is a hot topic right now. We used to talk more about the **purpose** of an organization or group. Today, more often, we talk about the **vision** of an organization or group. Because of this, we need to develop a new way of thinking. Let's start learning from the future, rather than assuming we must learn from the past. If we continually worry about "fixing the past," will we ever give attention to creating the future? We can learn from the future! Do you believe this?

(A short discussion on what this means to people may be helpful.)

The message in many new books is that leaders create a purposeful future. Leaders envision a desired future, and then work to create it.

We can do the same thing. We can envision how we want our future to be. We can then take the necessary steps to create this future for ourselves. One of the basic skills of a leader is the ability to help others envision their future, create a shared understanding of the future, and work with people to help create this desired future.

Another way of saying this is: Are we going to let things happen to us (reactionary); or are we going to be out front, creating our own happenings (visionary)?

The Meaning of Vision

Vision is the most descriptive term for what happens when leadership is occurring, for these reasons:

- Vision is a "see" word. It evokes pictures and images. What do you see?
- Vision suggests a future orientation; a vision is an image of the future.
- Vision connotes a standard of excellence, an ideal. It may be a challenge to our creativity.
- Vision has the quality of uniqueness. What we envision for our community, our lives, is very unique.

We can invent the future. What is your role in this? Are you willing to risk being an active inventor of your local future?

Older Adults Can Help Create the Future

Remember our quote from the beginning of this series:

> *"People over 55 have the power, if they choose, to shape the future. Now, more than ever before in their lives, they have freedom, knowledge, experience and the power of choice. The active retired have more autonomy and often are less concerned about what others may think of them. They may choose to become involved in activities without fear of losing status or jobs."* — Don Littrell

Now, we are going to practice creating our future. These techniques can be used with many different groups. Different age groups, differing factions within the community, even people with ideas opposite of yours, can use this process to see points of agreement.

First, a tip in group process: As a leader, use a flip chart at every gathering. Use it to record ideas, to record who was there, to record decisions, etc. This gives a visual history of the group for all to see. It helps people visualize the process and progress and it keeps a social history of the group. It enables you to bring new participants up to speed when you are working on a project. It helps develop trust because everyone can see what is going on. It keeps you from making conflicting decisions because decisions are recorded for all to see.

EXERCISE: Ask participants to break into groups of four or five. Ask: What do you want the future to be like? Ask participants to list the conditions they want for the future. We are concerned here with the results, not the means to the end. For example, don't simply list as a goal, "education for all." We are concerned with the result of education, and the goal might be better framed as, "every individual attains the ability to read to the level necessary for their purposes."

Ask the participants in each group to agree on the three conditions that are most important to them.

Go around and let each group report on their three top conditions. No doubt, there will be many similarities in all of these lists. There is usually common agreement on basic values and what is important to people, regardless of age.

Purposefully building a future rather than fixing the past is what we need to be about. You can stimulate thinking on any community issue or problem situation by envisioning the future. This gets people out of their old ways of thinking and into a more creative frame of mind.

As a leader in your community, can you envision yourself asking people to your home, several times, to discuss what we want the future to be, and what work is necessary to get there? A home environment is conducive to free-flowing discussion. This is where we feel comfortable and safe.

Once the vision is clear, as a group, you may want to write a short mission statement, do a task analysis, and start enlisting volunteers to work specific aspects of the task. You will be on your way to creating a better community.

You can see why we keep saying that there is a new role for leaders. We must be information developers and researchers. People want their own information. They tend to mistrust research studies that were done elsewhere. Based on local information, we can start to control what we want our community to become.

We need to develop locally based information systems to guide local decisions. Local decision makers don't believe the research studies that have small samples or scientific research studies from universities. These research studies simply don't have enough credibility. People trust their own information, gathered by their own people, more than research studies.

The biggest challenge we face is developing information that has the trust of the local people, while also having scientific validity.

Learning and Research That Must Happen Locally

1. How are local people impacted by national trends and conditions? Leaders must be aware of all the options contained in national trends. Leaders must keep a world view.

2. Leaders must believe that local people can make a difference. They must determine how to make it happen.

3. Leaders must know how to find and use technical information. (We are very good at this in the U.S.)

4. Leaders must know how to develop effective work structures. Local leaders must create structures. "No structure is inherently good or bad, but it can be made so by the people in it." Leaders must understand that it is possible to create new structures to meet our needs.

You've probably heard people complaining about government regulation. Most government action and regulation comes in response to demands from a constituency. Think about noise restrictions around airports, clean air acts, etc.

When we are in a "fix it" mentality rather than our "futures" mentality, we have historically transferred these responsibilities to "the government." We can see that we need to work at the local level to create what we want as citizens.

Private Decisions vs. Public Decisions

One of the social revolutions of our time is the expansion of the public agenda. With current media coverage and communications technology, the public is more involved than ever before. Think about local efforts to set priorities on the environment, nursing home reform, spouse abuse, drug abuse programs. Look at how much more we, as individual citizens, are involved in these issues than we used to be. Many issues that used to be considered private decisions are now impacted by public opinion.

Think back to Retreat Session 1.3 when we listed all of the services available at the local level. A private decision may become part of the public agenda if, for example, we have a local agency that handles child abuse. Local volunteers make up the boards and committees which set policy for these agencies. Local people can influence the legislature to pass laws regarding these issues. Competent volunteer leadership is needed to deal with all issues.

Chapter 13

THE LEADERSHIP FUNCTIONS: MODELING, INTEGRATING, PRACTICING AND PROCESSING

by Don Littrell

RETREAT SESSION 3.1 - TWO HOURS

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Lecture

This session will serve to wrap up and review our previous retreat sessions. As we use the handouts from past sessions, please think of questions for discussion.

Leadership Functions

Leadership is work to be performed. Leadership functions fall into two categories: task accomplishment skills and personal relationship skills.

The Task Accomplishment Skills

- Analyzing the problem, breaking it down into manageable tasks.
- Developing contracts with people so we have a shared, agreed upon understanding of the mutual expectations. This should include an ending date for involvement.
- Formation of teams to work on issues and projects.
- Development of a file of people listing their interests, concerns, skills, knowledge, so we can ask them to participate in our project on their terms.
- Gathering facts and information on an issue. It is easy to label people as apathetic if they are simply disinterested in what concerns me.

The Individual Relationship Skills

- Symbolic, verbal and non-verbal communication.
- How to listen effectively.

We will cover individual motivation in a future session on volunteers, and more about group relationship skills in another coming session.

We discussed the kinds of learning that needs to happen in a community in order to meet the challenges of our fast paced information society.

Learning That Must Take Place

- How local people are impacted by national trends and conditions.
- Understanding possible options; being aware of all the options.
- Keeping a world view.
- That a person can make a difference and how to do so.
- How to find and use technical information.
- How to develop effective work structures. We can create new structures to effectively meet our needs.

We discussed visionary leadership and the work necessary to make this a reality.

We discussed the power of citizenship and how we have the ability to set the public agenda. You don't have to know anything about an issue to put it on the public agenda. You don't need to know the solution. You do need to know how to break down the problem into its component parts so that a purposeful team can be assembled to begin work on it.

Always ask people if they are *willing* to work on a project or task, not if they *want* to; there is a subtle difference, as we discussed. Often people will plead lack of interest rather than disclose their fear or ignorance.

Let people do things! Every time you take away things for people to do, you take away their learning experience. People want to be involved in meaningful activity, doing things they believe will benefit society.

Leadership Skills: Modeling, Integrating, Practicing and Processing (MIPP)

Modeling. Every time you step out the door, every time you take a leadership role, you are modeling your behavior. You serve as a role model for others. Those who know that you have taken this course will be looking to you as an example of good leadership in action. Modeling leadership is one of the most effective ways to teach it.

As you model good leadership practice, you can be an example of how leadership skills can help groups and organizations accomplish tasks, build productive relationships among members, and help members meet their individual needs.

Integrating. As a leader, you can help people integrate their new leadership skills into their everyday work with people in groups and organizations. You can show people how they can use these tools with the next project. You can show them how they can transfer this new skill or knowledge to the next situation they encounter.

Practicing. The only way to practice leadership is in public. Practicing in public can be scary and could put you into some embarrassing situations. This course is a safe place to practice some of your leadership skills. As you practice in the groups that you belong to, don't expect to be perfect. You are still practicing and perfecting your skills. Anytime you work with people, you are in an experimental situation, nothing is set and something different may happen each time. Just keep practicing.

Processing. Most people learn best by *doing* if they understand *what* it is they are doing and *why*. In your leadership roles you can help people process their feelings about their experiences. Processing is the step that combines action with reflection. You can help people understand the dynamics of a situation. When they become aware of their new found skills, they can use them on the next project.

Final Thoughts

Stability used to be the normal state. Change is now the normal state. To be effective, we need to be concerned about developing a purposeful future rather than fixing the past. By the time we get the past fixed, it will be obsolete and we will always be playing catch-up. Volunteer groups have the freedom to be futurist organizations. Government organizations are often too overwhelmed with maintenance issues to create the positive future we envision. It is up to you and me to do it.

Chapter 14

ASSESSING INDIVIDUAL LEADERSHIP SKILLS

by Don Littrell

WEEKLY SESSION 4.1 - TWO HOURS

HANDOUTS	Looking At Your Leadership Skills Tip Sheets: Personal Relationship Skills (#'s 19-25) Tip Sheets: Task Accomplishment Skills (#'s 26-35)
ADDITIONAL HANDOUTS	Other handouts could include the following: Tip Sheet: Building Accountability The Art of Delegating Tip Sheet: Moving On *(See Appendix: Weekly 4.1)*

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Lecture

This session will be very interactive, focusing on areas of interest to participants. It is meant to be a free-floating session. However, some structure has been built-in to keep the process moving in case the group is quiet, not responding, or if a new instructor is leading the group. It is important that the instructor have rapport with the participants. For the session to work well, participants must feel free to ask questions. It is recommended (though not essential) that the instructor/facilitator who led the retreat sessions lead this session too. Be prepared with case studies to stimulate the group if the discussion begins to lag.

De-mystifying Leadership

This session will concentrate on assessing your personal skills, knowledge and strengths. I want you to realize how much you already know. We will strive to help one another improve in areas where more skill may be needed.

We talked about leadership as a set of functions. As we learned, once a vision of the future is in sight, we must analyze our situation and break it down into manageable parts. We must then look for people to do specific tasks. This often means working in a group. Both task accomplishment skills and personal relationship skills are important.

We can learn the leadership skills necessary to becoming an effective leader. We have learned about the parts of leadership that make up the work to be done. You already know a lot of these functions and you can help others recognize their contribution.

How do you see yourself using these skills?

(Do a casual survey of the participants to get at perceived obstacles to using these skills.)

Assessment

(At this point, if your group has not generated it's own questions and agenda, you may use the assessment sheet to find areas to focus on during the remainder of the session.)

EXERCISE: Distribute "Looking at Your Leadership Skills." Instruct the participants to mark the sheet individually. Ask participants to come to the front and mark pluses and minuses on the chalkboard or flip chart by the items they marked. In this way, the group can assess which skills to work on during the session. Distribute the two sets of Tip Sheets: Task Accomplishment Skills and Personal Relationship Skills to use during the discussion.

Common Questions and Situations

Contracting with People to do the Job

How do we deal with a person who agrees to do something and then fails to follow through? We find that most voluntary groups are reluctant to put pressure on their members. That is, they are afraid to confront people who do not deliver, as promised.

One way of approaching this problem is to explore the reasons people don't follow through. Generally, it is because expectations have not been made clear. The best method of dealing with such situations is to use a contract. This clarifies expectations and allows you to check on a group member's progress. Contracts provide a way of structuring check points and encourage people to ask for help if they find they are in over their heads. Volunteers have many reasons for becoming involved. Knowing their personal motivation can also help leaders assign tasks in a realistic manner.

EXERCISE: Distribute "Building Accountability" and "The Art of Delegating."

The Authority of Individuals to Act

Someone may ask: "Who is going to give us permission to do this — who gives us permission to act?"

Do not assume that everyone in your group feels personally empowered to act on issues. You may find that older adults are more authority bound than other age groups. We must remember that in our society specialization and the "professional" have, in some cases, taken away what used to be a citizen's role. We now hire experts to do what neighbors, friends, church members and family used to do.

Individual citizens still have a lot of authority. A citizen's telephone call to a city council representative or state representative can impact the public agenda. Review session 1.3 and note all of the services provided at the local level. Each citizen can make a difference in each of these areas. Citizen referendums and ballot issues are becoming more common. Make sure your group members are convinced that they can call a meeting for any special interest they identify.

How to Say "No"

A common refrain we hear is: "I'm spread too thin, I can't take on any more work, but I can't say no when people ask me."

It is important to discuss this problem. Others in the group may have helpful suggestions. There may be a need for a workshop with your group on assertiveness training. Some help with setting priorities may be called for on an individual basis. If your group is dedicated to a particular cause, you can say no to other demands by declaring what your priorities are, at this time.

Getting Stuck in an Organization

Some other common refrains are:

> "I've lost interest in the group."
> "I'm burned out with this group, but I don't know how to leave gracefully."
> "How do I get out of my leadership position?"

Do any of you have ideas about how to deal with these situations?

Topics we have discussed that relate to these statements include participatory leadership and developing leadership functions within the group. To deal with such situations, a person might contract with the group to serve for a limited amount of time (two months for example); time enough to allow the group to train a replacement for the leadership function.

Here again, contracting is useful. It allows people to know the term of their office. The group may want to write a by-laws statement limiting the number of years one individual may hold a position. Many community groups are run informally, without such structure. Your knowledge and expertise about structuring a group can help clarify these issues and help you avoid such situations.

Accumulated experience working with groups indicates that they can be successful. Many have not had positive experiences working in groups, and for this reason, these people may be hesitant to see groups as a means of solving problems.

EXERCISE: Distribute: "Moving On." Discuss any points the group finds interesting.

Other suggested discussion questions are:

- *How do you personally feel about the effectiveness of group action?*
- *We all know several "committee" jokes. Such as, "The camel is a horse designed by a committee". Do you think these are more true than false? Why?*

Suggested exercise: Ask participants to list all of the groups they have been in during their lives (eg., band, Sunday school, school clubs, lodges, etc.). Most participants will probably have a long list.

(Review the information regarding task accomplishment skills and personal relationship skills as well as areas marked for additional discussion.)

Chapter 15

WORKING WITH PEOPLE IN SMALL AND LARGE GROUPS

by Murray Hardesty

WEEKLY SESSION 4.2 - TWO HOURS

HANDOUTS	Four Corners Theory Sheet Task and Maintenance Related Questions Positive Group Roles Negative Group Roles Suggested Activities for Facilitators Serving a Group *(See Appendix: Weekly 4.2)*
PREPARATION	Make four signs to be placed in the corners of the room. The signs should say: ACTION, CARING, MEANING and STRUCTURE. Prepare a transparency with the overhead master "Group Functions."
SUGGESTED READING	Jung, C. (1923). *Psychological Types*. New York: Harcourt Brace. Keirsey D. & Bates, M. (1984). *Please Understand Me: Character and Temperament Types*. Del Mar, CA. Prometheus Nemesis Books.

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Lecture

In this session we will learn about the structure of groups and how people interact in groups. The roles you play in the group, either as a member or leader, are very important to the success of the group. Understanding these roles will help you move the group along.

When you think about your activity in a group, which of these four words do you consider the most important?

(Have the words ACTION, CARING, MEANING and STRUCTURE written on the board.)

EXERCISE:	Have signs (ACTION, CARING, MEANING and STRUCTURE) taped to the wall in the four corners of the room. Ask the participants to gather under the sign that they relate to the most. You might ask, "Which word means the most to you in relation to a group?" After participants have gathered in the group of their choice, ask them to discuss, among themselves, why they chose this word. Ask participants to appoint one member of their group to act as a reporter. After about 5 minutes, ask each group to report on why they chose the group they are in.

All opinions are right. Each function is important. Most groups have all four priorities among the members.

OVERHEAD:

MISSION
(meaning)

GOALS AND OBJECTIVES
(structure)

ACTION PLAN
(action)

CARING
(caring)

You will recognize these as task functions.

(Discuss the diagram in relation to the four elements.)

Meaning. This relates to the mission of the organization or group. Caring and meaning go together. People may join an organization because it has great meaning for them.

Structure. This relates to the goals and objectives of the group or organization. It is the "why" of getting together (ie., setting priorities).

Caring. This overreaches all of the other parts. Most people will not join a group unless they care about the people, the mission, the structure and the action.

Action. This is the doing of the task — the accomplishment.

Components of Effective Groups

There are three components to every group. This is common sense, but if you haven't thought about it in this way, it isn't common sense to you.

In any group you must consider:

- the individual member;
- the group as a dynamic;
- the organizational structure.

We want all three of these components to be functioning effectively.

Carl Jung's Theory

EXERCISE:	Distribute the "Four Corner's Theory Sheet."

Carl Jung developed a way of looking at people's mental functioning which is still valid today. He said that people have four mental functions; that is, two ways of perceiving things and two ways of judging things.

Perceiving is our way of seeing things in the world. We can do this by sensing or intuition.

Judging is how we draw conclusions. This can be done by thinking or feeling.

Jung proposed that our preference for doing a task a certain way may have something to do with our mental functions.

People who perceive (see) in a sensing way, will prefer action.
People who perceive (see) in an intuitive way, will prefer meaning.
People who judge in a thinking way, will prefer structure.
People who judge in a feeling way, will prefer caring.

Perceive

Sensing ———————— Action

Intuition ———————— Meaning

Judge

Thinking ———————— Structure

Feeling ———————— Caring

You can see that individuals could fall into one of four different categories.

- Sensing thinkers, who prefer action & structure.
- Sensing feelers, who prefer action & caring.
- Intuitive thinkers, who prefer meaning & structure.
- Intuitive feelers, who prefer meaning & caring.

If you neglect any of these areas, the individual may become unhappy in the group. Each individual in the group will be emphasizing his/her particular preference.

These four elements are also important components of an effective group:

- meaning
- structure
- action
- caring

In a group for instance, task functions (getting things done — structure, action) will appeal to the sensing thinking types. While maintenance functions (how things are done — encouraging, harmonizing, caring), will appeal to the intuitive feeling types. These types balance each other within a group and each type is essential to the effective functioning of the group.

(Display overhead - "Group Functions")

In the organization these elements are also present, but may be defined as:

- Mission or purpose
- Goals and objectives
- Action plans
- Maintenance or harmony

Slight any area in the organization and you leave someone out. This will lead to dissatisfaction and disharmony in the group or organization.

This all relates back to the diagram:

Task - How the group gets things done.
Maintenance - How the group deals with its members.

All of these aspects are intertwined and must be addressed in every group.

For more detail about this and the Myers-Briggs typology, refer to Keirsey and Bates (1984), *Please Understand Me: Character and Temperament Types*, an excellent resource to explain these different types and how they function in a group.

EXERCISE: Distribute "Task Related Questions & Maintenance Related Questions."

As a group member you can ask these questions to evaluate how well the group is meeting both the task and the maintenance concerns of the group.

Positive Group Roles and Negative Group Roles

Individuals in a group may take one of many different roles. In fact, the same individual may take one role at one time and another role at another.

EXERCISE: Distribute "Positive Group Roles."
Discuss each role.

Positive group roles can be either related to the task or maintenance functions.

EXERCISE: Distribute "Negative Group Roles."
Discuss each role.

You need to be aware of the negative roles that some people play.

EXERCISE: Distribute "Suggested Activities for a Facilitator Serving a Group."
Discuss the 10 points.

Chapter 16

HOLDING EFFECTIVE MEETINGS

by Murray Hardesty and Carol M. Schultz

WEEKLY SESSION 4.3 - TWO HOURS

HANDOUTS	Checklist For Planning a Successful Meeting TIP Sheet: Agendas

(See Appendix: Weekly 4.3)

ADDITIONAL HANDOUTS	Conflict Management Handle Conflict Creatively, Parts A and B, C and D
EQUIPMENT NEEDED	Movable chairs to break into small groups. Chalk board or flip chart to record responses.
SUGGESTED READING	Smith, M. (1975). *When I Say No, I Feel Guilty,* New York: Bantam Books. Sowell, T. A. (1987). *A Conflict of Visions,* New York: Morrow.

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Lecture

In this session we will be learning about holding effective meetings. Do you enjoy going to meetings? *(Elicit responses.)* It really depends doesn't it? It depends on a lot of things: whether you think anything was accomplished; whether you felt worthwhile and needed; whether you learned anything; how well the people got along, etc.

Before we begin talking about forming an agenda or dealing with difficult people in a meeting, we have to talk about the purpose of the meeting.

Remember the session where we analyzed the issue? Once you break an issue down into smaller parts, selected teams can work on various parts of the issue. Some groups may not even have to meet as a whole, if they have definite assignments for each member.

EXERCISE: Distribute "Checklist for Planning a Successful Meeting." Discuss each section.

Planning

We are accustomed to calling meetings. We do it out of habit. But a meeting may not be the best way to accomplish our goals. Always ask: "Is this meeting really necessary?"

The Audience

Once you have clarified your objectives for the meeting, you will know who needs to be there. The analysis sheet will simplify this question. It will outline the talent or expertise needed to accomplish your task.

Defining and Presenting the Message

Quite naturally, you want to deliver your message in the most effective way. This relates to the goals for the meeting. Do you want to present information, change people's minds, present an emotional issue? Careful consideration of the presentation of materials can help you reach your desired objectives.

Meeting Location

The physical arrangements and the meeting location may influence your audience attendance. Think of places that you would like to go for a meeting, or would not go. Some people will not go into another church, or into certain neighborhoods, or a place that serves alcohol.

Meeting Responsibilities - Assigned and Accepted

If this component of meeting planning is thought through carefully, you should have a smooth-running meeting. Make sure your presenters are well prepared. Make sure that the desired reports are complete. Know who is providing refreshments and who will help set up the meeting room.

Audience Recruitment and Preparation

This task will require your analysis sheet. Target important people (important to your task, not in community stature necessarily) for attendance. Make sure they receive a personal invitation. Recruit your audience. This is probably a new idea, as we are used to sending out a notice to all the members or announcing a meeting in the newspaper. Analysis of the issue will make it easier to determine who should be at each meeting. Materials can be sent, in advance, to prospective meeting participants. This will help them to prepare for discussion.

The Speaker

Have you gone to a meeting and heard the speaker start his/her talk with a statement like: "I really don't know why I'm here..." It makes me wonder: "Why am *I* here?" Make sure your speaker clearly understands the goals of the organization and why he/she was asked to speak. Provide the speaker with an overview of the audience you expect to attend — their background and goals. This will help the speaker focus the presentation.

The Meeting Day

The big day has arrived. Make sure you arrive at the meeting place early to check out the arrangements. Check on microphones, audiovisual equipment, etc. Greet the meeting participants and have someone to direct them to registration, refreshments or proper seating. All of these details will contribute to a smooth flow. Have someone assigned to meet the speaker or special guests.

Evaluation of the Meeting

At the very least, the officers or organizers of the meeting should debrief after the meeting. Look at areas which went well and areas which need improvement.

Follow-up

This step will insure that the assignments made, and tasks volunteered for, will see progress before the next meeting. It will increase the group's productivity.

Preparing an Agenda

Agendas are guides which expedite group accomplishment by focusing the discussion and making wise use of time. All well planned meetings have an agenda, most often mailed to the meeting participants in advance.

EXERCISE: Distribute "Tip Sheet: Agendas."
Review material and discuss points of interest.
Elicit discussion of the participants' experience with agendas.

Handling Controversy

As we learned, if an issue is important, you can expect controversy and conflict. If you have performed your leadership functions well, you will have a diverse group of people working on your project, representing many points of view. Differences of opinion are to be expected when people of diverse background and interest are brought together to work on a project.

Conflict must be managed however, to ensure that the group does not break into warring factions. Unresolved conflict can make people feel defeated and demeaned. Such conflict will impair cooperation and may cause some people to leave because of turmoil.

Conflict can be creative as it forces people to examine their point of view and search for new ways of approaching the issue. Better ideas are produced when long-standing problems surface and are dealt with.

Levels of Conflict

It is essential to identify what kind of conflict you are dealing with. The depth and complexity of the conflict is related to the basic issue at stake. Four levels of conflict have been identified. Each one is progressively harder to deal with.

> ***Level 1: Facts or Data.*** In this case, two people simply have different information. This is sometimes a communication problem. Once the information is shared, there may be agreement.
>
> ***Level 2: Process or Methods.*** Two people may disagree over the best way to achieve a goal or solve a problem. This type of conflict can usually be solved by using problem-solving techniques.

Level 3: Goals or Purposes. In this case, people cannot agree upon the group's basic purpose or mission. By using the visionary leadership techniques taught in the program, you may provide a way for people to define their mission. Negotiating goals takes a lot of patience, but it is essential for the group to function.

Level 4: Values. Conflict over basic values is very hard to deal with. People may disagree about the meanings of situations. **Anytime you hit a topic that produces strong emotions in the participants, you know you have struck at a basic value.** Conflicts of values most often require the services of a negotiator from outside the group.

The following suggestions may help you deal with group conflict:

- Deal with one issue at a time
- Focus on the issue while it is small
- Define the conflict in cooperative terms
- Deal with issues not personalities
- Use persuasion, not threats
- Opt for full disclosure of all facts
- Show concern for other parties' interests
- Emphasize what you still have in common
- Portray a trusting and friendly attitude
- Opt for a win-win feeling
- Generate new ideas — additional information
- Involve all the parties at a common meeting
- Clarify on which level of conflict you are dealing

EXERCISE: Review all materials. Distribute "Conflict Management" and "Handle Conflict Creatively, Parts A,B,C and D."

Next time we meet, we will cover issue analysis and resolution and problem solving techniques.

Chapter 17

ISSUE ANALYSIS AND RESOLUTION

by Don Littrell

WEEKLY SESSION 4.4 - TWO HOURS

HANDOUT	Community Issues Work Sheet *(See Appendix: Weekly 4.4)*
EQUIPMENT NEEDED	Flip chart and markers
ADDITIONAL PREPARATION	The group exercise is based on the analysis of an issue. Each small group can choose an issue or you may wish to choose an issue of general community concern. If you decide the latter, you may wish to prepare a written description of the problem to read to the group or to distribute as a handout. If you have your own favorite "problem-solving process" you may wish to present this with the materials and handouts.
ADDITIONAL READING	Wade, J. (1989). Felt Needs and Anticipatory Needs: Reformulation of a Basic Community Development Principle. *Journal of the Community Development Society,* 20, (1) 116-123. (*See Appendix: Retreat 1.4)*

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Lecture

This session deals with issue analysis and resolution. First we need to distinguish between problems and issues. Different methods are used in approaching each. You need to approach issues and problems with different mental sets.

Problems vs. Issues

Problems. A problem is something that must be fixed. There is a ready solution, a direct "fix-it quotient." With a problem there is consensus on the need to fix it. There is also, usually, a definite task to be accomplished.

Issues. An issue is a very complex, difficult situation. There is much difference of opinion, public debate and controversy associated with it. An issue calls for a process oriented rather than action oriented solution.

Different strategies, methods and attitudes are associated with problems and issues.

With a problem, you marshall resources and fix it (for example, fix a bridge).

If you are dealing with an issue, you need analysis, research and opinion polls to come to terms with it (for example, what to do with solid waste in the community).

Unfortunately, most groups try to approach an issue with a "fix-it" attitude. This never works.

An issue involves values. A value is what makes a grown man or woman cry.

As leaders, you need to recognize and separate the two and develop two separate agendas for dealing with problems and issues. There must be a problem agenda and an issue agenda.

If you fail to distinguish between problems and issues, you may face confusion, and then little is accomplished. At the beginning of any task, look at the situation carefully. Is it a problem that can be solved? Or are you dealing with an issue that must be put through the analysis process? If you take the time to determine what you are facing, your work will go much better.

Analyzing an Issue

To analyze an issue, your group may decide to develop a task force of members, conduct a self-study, survey the community, and/or conduct focus groups to gather as much information as possible about the issue.

Notice that we have not said anything about "needs assessment". This term usually conjures the image of a massive survey. (The results of which are often obsolete before the study is published.)

But, let's step back. We are still *analyzing* the issue. We are gathering information to determine public opinion. During the analysis stage, we need to look at who and what is going to be affected, both positively and negatively, by actions associated with an issue.

This is not the point at which you interview all your friends — who, we will assume, you know hold an opinion in harmony with your own. Instead, this is the time to listen to all points of view.

If you decide that you will support a proposed solution, then you become an advocate for that position. This will limit your nonpartisan leadership role. We will learn more about the educator and advocate roles a leader may play in a later session.

EXERCISE: Using the "Community Issues Work Sheet," ask participants to divide into small groups to analyze an *issue* pertinent to their community. Each group can choose an issue or the entire group can work on the same issue. The facilitator may choose to have several current issues as options for the group to select. The issues may have been discussed in the local newspaper, or one important to a group to which one of the participants belongs.

Ask each small group to report on their analysis. The large group can identify gaps or point out areas for further consideration.

Dealing with the Issue

After your group has completed an issue analysis, you will be ready to begin dealing with the components of the issue. There are, roughly speaking, four steps in dealing with an issue: (1) analysis, (2) assessment, (3) reaching consensus, and (4) action.

Analysis. When conducting the analysis, do so with as much participation as possible. Put information on the table and discuss it. At this stage, flip charts are sensible because they allow you to display all parts of the analysis — everyone's ideas — for all to see. You might also ask someone to serve as a recorder. The recorder can make a copy of the analysis for each member. The tendency during analysis is for people to look around to see who agrees with whom. People will often then gather around one another to advocate for a position or action. Try to avoid such situations. As many different points of view as possible need to be considered for analysis to prove effective. Try to avoid being caught in the trap of "circles of ignorance."

Assessment. During the second step, your group must assess the type and quality of information at hand, and the type of information still needed to analyze each component, or "critical part," of the issue.

A "critical part" is a concern that must be addressed if the group is going to be able to reach a consensus. This step can make or break a group and therefore, time must be spent on assessment. People can begin, sometimes slowly, to deal with each critical part of an issue in such a way that they can support each other rather than work at cross purposes. As the group works through assessment, members can begin to see where resources should be concentrated, what decisions must be made and by whom.

Consensus. The group can now move to a win-win situation. If the group has spent enough time in clarifying their vision, agreement on overall outcomes should begin to emerge. Consensus is not 100 percent agreement. But enough over-lapping agreement will allow the group to meet needs and move to a win-win situation. We can not expect perfect agreement, but enough to begin working toward a solution.

Action. At this point, you may gather or build a team of people to supply missing information, to add crucial talents and to connect with established community networks. This team should help the group relate to all diverse points of view.

Do you see how you might use these four points in dealing with an issue?

Discuss questions and concerns that the participants may have about the material.

The Advantages of Issue Analysis

- Analysis provides the tools to monitor the group's needs: areas where more information may be needed; problem areas or "critical parts," etc. Analysis allows you to know where you are in the process at all times.
- Analysis is especially important in volunteer organizations. It allows the group to add new information and change direction, if necessary.
- Analysis makes it legitimate to ask for help from individuals and other community groups.

- Analysis is important in voluntary organizations (more than in business), because everyone is negotiating rather than being told what to do.

- Analysis helps fit new people into the organization. It can show them where they can become active.

- Analysis helps leaders help groups. We should not say: "We've got to get organized," before we have identified the work to be done.

- Analysis builds in a review process. It allows us to check our accomplishments and make corrections and adjustments if we drift from the primary purpose. We can see what types of adjustments need to be made.

You might consider this process for those issues that are important and deserve the expenditure of the time and resources that will be called for. You may not want to use this process for every concern that comes up. And if something has worked in the past with your group — if you know how to do something and it is working — keep doing it!

The Problem Agenda: Problem Solving

We have defined a problem as a situation that has a ready solution. A problem is something that can be fixed. There is a consensus that it needs to be fixed.

There are many different problem solving methods. We will now examine a problem solving process that has proven effective. The steps in this process are as follows:

1. ***Define the problem.*** We must first develop a clear definition of our problem and reach agreement on its nature. To do this it is necessary

to collect and analyze data. Questions that may help with this step include:

- What is the problem? Is it a symptom or a cause? (For example, the car not starting, is that a symptom of a problem or a cause?)
- Who has the problem?
- Why is it a problem?
- What needs to be changed?

2. *Analyze the problem.* After defining the problem, we must analyze it. To do this, we must keep the following factors in mind:

    - What are other people's values, attitude and beliefs?
    - Is this an issue, or is it a problem? If an issue, we must treat it as such.

3. *Set goals.* We must attempt to reach agreement about what we wish to achieve. If we are ambiguous in our problem definition, then we will have ambiguous goals. When considering goals, the following elements should be clearly in mind:

    - All possibilities must be considered.
    - We must involve as many people in the process as possible.
    - We must select feasible, technically possible and financially acceptable goals.
    - Goals must be stated in measurable terms.

4. *Agree on a solution.* If our work has been done well to this point we should be able to find a solution to our problem. Still it is important to consider all options and gather ideas from many people. As a group, we may then proceed to decide on a course of action.

5. *Implement the solution.* At this stage, we are ready to assign and accept responsibilities. We should begin to mobilize public support for our solution. To successfully mobilize the public, it is important to:

   - Answer questions.
   - Involve people in the task.
   - Develop and distribute fact sheets to answer questions.
   - Establish short-range goals so that progress can begin; this will stimulate enthusiasm.
   - If our solution is not working, we must modify goals.
   - Finally, we must give credit where credit is due.

6. *Evaluate the process and the outcome.* At this point, we may want to review the components of the process:

   - Develop a vision of a positive future.
   - Analyze the situation.
   - Identify the issues/problems.
   - Gather facts.
   - Build a purposeful team to work on each aspect of the issue.

- Involve as much local competence as possible.
- Resource gathering.
- Broad participation.

(You may want to review the overhead transparencies from Session 2.4, "Some Reasons for Resistance to Change," and "Conditions Which Have Been Found to Lessen Resistance to Social Change.")

Today we have learned about processes to address issues and problems. It is important to take time to carefully analyze a situation and classify it as either a problem or an issue. If we do, we will save much time in the long-run.

Chapter 18

PUBLIC POLICY AND COMMUNITY CONCERNS

by Eunice (Pat) Lieurance

WEEKLY SESSION 4.5 - TWO HOURS

HANDOUTS	Are You Involved? Action List One Vote Does Count Public Policy Quiz Rules of Thumb on How to Work With Decision Makers
ADDITIONAL HANDOUTS	Writing to Policy Makers A Personal Plan for Involvement in Public Policy Get Involved in Public Policy Be Sure Policy Makers Hear You *(See Appendix: Weekly 4.5)*
ADDITIONAL PREPARATION	Have plain white paper on hand for participants to write to their public officials. Provide business size envelopes for those who may want to mail their letter immediately.

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Lecture

Today we are going to discuss public policy and community concerns. First, think about what gets you excited in your community.

EXERCISE: Ask the group to complete this statement:

"There ought to be a law..."

Ask participants to write their ideas on paper to read to the whole group, or ask selected individuals to report their statements.

Throughout this leadership series we have been learning that individuals can influence the development of issues in the community. If you feel "there ought to be a law...." you can take action to make changes now!

Today, we will focus on specific techniques to use when approaching policy makers, politicians, government officials and others who need to hear our voice. Sometimes people are intimidated by those in positions of power. However, applying the leadership functions we have been learning, we can have more influence on decisions that are made.

How involved are you in the political process in your community?

EXERCISE: Distribute and ask participants to complete the check list "Are You Involved." Discuss each item briefly. Ask how many checked 12 items, 10 items, etc. This will give you an idea of the current level of activity in the group. It also may lead into a discussion of participants' attitudes about politics, politicians and how much influence participants feel they have on the process.

You do make a difference. You can have an impact on political issues. Think back to the retreat session where we listed all of the services, agencies and departments available at the local level. You can have a direct impact on any of those units by speaking to the person in charge, by being on an advisory committee, a community task force, etc. One vote does count.

EXERCISE: Distribute and discuss "One Vote Does Count."

You can be involved in public policy in at least three different ways:

- As an impartial observer, choosing to do nothing
- As a public policy educator
- As a public policy advocate

For now, we are going to ignore the first category, the "do nothings." It is sometimes necessary to be an impartial observer, but we are more interested in the difference between an educator and an advocate. Once you know the difference, you can decide which you want to be, and plan a necessary course of action.

Educator

The public policy educator attempts to be as objective as possible. In this role, the following actions are appropriate:

- ***Define the problem.*** By defining the problem, we help people move beyond the symptoms of the problem to discover the basic issues involved.

- ***Define all possible alternatives.*** This allows us to consider any reasonable course of action.

- ***Define the consequences of each alternative.*** By defining consequences, instead of the advantages and disadvantages or pros and cons of a situation, we keep value judgments out of the picture. This makes our judgement a bit more neutral.

- ***Observe and record the decision.*** From the list of consequences, the community group or individual makes his/her/their decision. The educator, however, must remain neutral and objective.

Advocate

The public policy advocate studies the issues and then takes a stand. In this role, the action steps for educator apply. In addition, the following actions may also be appropriate:

- Take a stand or a position

- Attempt to convince decision makers to agree with the position

What is Public Policy?

Let's look at public policy as a concept.

- Public policy is an identifiable course of action hammered out in the public arena to maximize the satisfaction of society. Public policy, in theory, should be beneficial to the most people and should improve the general welfare. (Examples are policies regarding libraries, tax bonds, zoning, day care, etc.)

- Public policy is usually developed through a process of debate and compromise. Policy makers must hear opposing views from many different people to understand the diversity of opinion if they are to make good decisions. That is why it is the responsibility of every citizen to be involved.

Characteristics of Public Policy

- Public policy always involves an issue, not merely a problem. Remember the distinction we made between problem and issue? If we can solve the situation by running it through a lab, it is not an issue. An issue requires analysis and discussion.

- In public policy, there is no clear right or wrong. The policy may affect different groups in different ways.

- Public policy may cover a broad range of interests and concerns.

- Public policy will most likely be controversial.

What is an Issue?

Last session we discussed issue analysis and resolution. Just what is an issue? Remember, we said that an issue is a very complex, difficult situation. It is process oriented rather than action oriented. Each issue contains three components:

- *Fact.* What *is*.

- *Myth.* What people think or believe *is*.

- *Value.* How we feel about what *is*.

EXERCISE: Distribute the "Public Policy Quiz." Ask participants to complete the quiz and instruct them to check the items that are value judgments. When they are through, ask participants to volunteer to discuss those items they did not check. All of the items on the sheet are value judgments. Our opinions are most often based on very few facts, as this exercise points out.

The Role of an Educator in Public Policy

Most often, you will function as an educator in your leadership role. To function as an educator, you must believe strongly that education can make a difference.

- You must believe that if people are enlightened and informed they will act in their own best interests. You must firmly believe that people will work for the good of the community, not their own selfish interests.
- You must believe that the democratic process is the best, that it does work, though slowly at times.
- You must believe that no one individual has the wisdom to make decisions for society. You must believe that decisions should be made collectively.

EXERCISE: Distribute and discuss "Rules of Thumb on How to Work with Decision Makers."

Your Role as an Educator

- Remember, you are an educator, not a local politician.
- Provide facts, alternatives and consequences, not solutions to public problems based on your personal value judgments.
- Be an objective analyst, a reliable source of correct information.
- Keep your ears open and your mouth shut when working with decision makers and political leaders involving public issues.
- Study who makes decisions in your community by asking questions and attending coffee hour at the local cafe. Visit beauty parlors, barber shops, and sale barns.
- Don't "play ball." Do no special favors. You only have one chance to lose your integrity. Make sure that it remains intact. You will be respected for it.
- Be on *tap*, not on *top*. Facilitate the decision-making process.

Dealing with Politicians and the Political Process

- Do not become identified with one political party.
- Do not take sides on local controversial issues.
- You must understand the political process. Accept it as is. Don't try to change or reform it — you can get caught.
- Don't become buddies with any faction or group.
- Invite decision makers and local politicians to your meetings. Introduce them and thank them for their support. Keep your program before them consistently, not just at budget time!

- Make an effort to learn the likes and dislikes of decision makers and their staff.

- In written and oral communication, be brief, organized, factual, and to the point. Decision makers are busy people! Five minutes and one page is all you can expect.

- During campaigns, provide information to all who request it. Do not support any one candidate.

Your Personal Traits Are Important

- Participate in local events. Be civic minded. Do your part. It will be noticed.

- Be complimentary.

- Be forthright and firm, but not self-righteous. Carefully evaluate your relationships with people so that you do not allow yourself to be used. Be courteous but firm when you "draw the line."

- Don't participate in community gossip.

- Be critical only as a last resort and then only in private, one-on-one.

The Advocate Role in Public Policy

If you decide to play an advocacy role in public policy, there are specific techniques that you can use in this process.

- You will need commitment. You have to be ready for the long-run. It takes time to find out the facts, organize your efforts and maintain the patience to see things through.

- You need common sense to evaluate each possible solution and express your feelings to the right people.

- You also need to educate yourself about the decision-making process. Read articles in your local and state newspapers, attend hearings, councils, legislative sessions and public meetings to see how the process works firsthand. Most senators and representatives have local offices where you may ask questions.

How to Study an Issue

- Investigate all sources of information. Printed information, newspaper articles, radio and television programs, public agencies and political parties are all sources of information. In addition, groups like the League of Women Voters often sponsor forums where good information about all sides of an issue are presented.
- You also need to know how, where and when an issue will be decided.

Writing to Policy Makers

We are now going to practice using our influence by writing a letter to one of our leaders.

EXERCISE: Distribute "Writing to Policy Makers." Provide each person with plain white paper if they do not have suitable writing paper. Using the issue brought up at the beginning of the class, or another issue of local, state or national concern, each participant will compose a short letter.

Review the handout by going through each point and asking if there are questions. Emphasize the sequence of the contents of the letter.

- Write on only one subject at a time.
- Keep your thoughts clear and to the point. Keep your letter short.
- Tell who you are and include your name and address in the letter.
- Tell briefly what actions you desire and why.
- Write each person individually; don't send carbons to different people.
- Give the specific House or Senate bill, if you know it.
- Be courteous.
- Decide when to send the letter.
- End with a thank you.
- Remember to write a thank you letter when the politician acts favorably on your letter.

Ask volunteers to read their letters. Have a supply of envelopes ready so that those who wish can mail them immediately. Some participants may wish to refine their letters before sending them. Others may have to be encouraged to send the letter at all. Ask participants to bring in any letters received in reply during the remaining weeks of the class.

Phone Calls

Making a telephone call to a government official can work as well as writing a letter or making a personal visit. Here are some tips to ensure an effective contact.

- Plan your call. A call takes as much preparation as a letter.
- Make notes about the topics you want to cover and prepare a place to write down the official's responses.
- Say who you are and if you are calling for yourself or on behalf of a group.
- If the person isn't there, state your reason for calling when you ask for a return call.
- Identify the issue, use specific bill numbers if you have them, and state your position.
- Listen carefully to the response. You may want to courteously discuss the issue.
- Thank the person for listening to you.
- A follow-up letter would be appropriate, summarizing the information you stated in the call.

Making a Personal Visit

A personal visit to your legislator can be very effective. Remember, these are very busy people, so plan your visit carefully. Don't be insulted if you have to talk to an aide or assistant, they will pass on your information to their boss.

- Make an appointment.
- Notes are important here too. Organize your questions and be prepared to take notes on the answers.
- Rehearse your question or your position statement so that you speak in a succinct way.

Testifying

Testifying at a public hearing is an effective way to express your opinion about an issue. This is a time when you must be very well prepared. Before you go, have someone listen to your presentation to be sure that it is clear and covers all the facts. Address one issue at a time. Make sure you speak only to the issue or issues on the agenda for the public hearing.

- Plan your talk; organize your thoughts on paper.
- Rehearse out loud; listen to what you are saying. Tape record or videotape your presentation to critique later if you cannot find anyone to listen.
- Develop an introduction, a main idea (body of the talk), and a conclusion.

EXERCISE: Distribute and discuss making presentations from "A Personal Plan for Involvement in Public Policy."

If you have time remaining, distribute and discuss "Get Involved in Public Policy," and "Be Sure Policy Makers Hear You." If not, distribute these handouts as additional reading.

Chapter 19

THE ROLE OF LOCAL GOVERNMENT IN COMMUNITY ISSUES

by Eunice (Pat) Lieurance and Carol Schultz

WEEKLY SESSION 4.6 - TWO HOURS

PREPARATION	The second half of this session lends itself to guest speakers who are either elected or salaried city and county government officials. Prepare guest speakers in advance so that they are aware of the topics they are to cover.
SUGGESTED READING	Flinchbaugh, Barry L. (1974). *How to Handle Public Issues in an Educational Framework.* Address delivered to the Annual Meeting of the Association of Administrators of Home Economics, Dallas, Texas. House, V. W. (1981) *Shaping Public Policy: The Educator's Role.* Bozeman, Montana: Westridge Publishing. Lindbloom, C. E. (1959). *The Science of 'Muddling Through'.* Public Administration Review, 19 (2):78-88.

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Lecture

During this session we will look further into the role local government plays in community affairs. Think back to the list we generated in the [retreat] or [earlier] session with all of the agencies, offices, and contacts available at the local level.

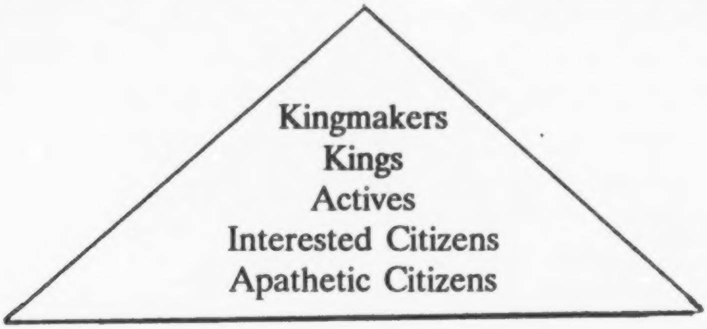
More hours are spent administering community affairs than any other peacetime activity. To have an impact in the community, we need to know a few things about how our local government agencies work.

Political scientists, public administrators, policy analysts and economists have come up with theories about how decisions are made on the local level. We will discuss some of these theories to get a better idea of how to look at our community.

The Kings and Kingmakers Model

Barry L. Flinchbaugh (1974), formulated a model which purports that a large percentage of public policy decisions are made by a few people. This model says that the majority of people are apathetic and poorly informed about public issues and rationalizes that a certain elite group of people should therefore make public policy. According to the kings and kingmakers model, the public policy agenda is set by the "kingmakers" and determined by the "kings and actives."

This is an elite model of public policy decision making. Visually, the model looks like a pyramid with Kingmakers at the top and apathetic citizens at the bottom.



Kingmakers. At the top of the hierarchy are the kingmakers with the financial and intellectual resources to influence public policy in the community, the state or the nation. Kingmakers come from rich, old-line families.

Descendants of a kingmaker can become kingmakers, if they have the intelligence. Kingmakers often work behind the scenes. Very few women are kingmakers; an exception may be when a kingmaker dies, his widow may become a kingmaker.

Kings. The kings are the clearly visible policy makers. These are elected and appointed leaders in government and organizations. They are always at meetings making decisions. However, they usually make the decisions the kingmakers want them to make.

Actives. Actives are the joiners, the civic-minded citizens. The actives go to hearings, testify, call people, work on issues that are important to them. They are the active members and leaders in service clubs and special interest groups.

Interested citizens. These are people who are fairly well informed on the current issues. They may discuss issues, but may be too busy to be active participants in the process.

Apathetic citizens. This category makes up the largest group of citizens. These people represent the "I don't care" group. This group is usually too busy surviving to become active, though they may become active if something affects them personally.

It has been noted that a person may move from one category to another — active to interested citizen to apathetic citizen, and vice versa, as issues touch him/her personally. This may be changing however, as people are more mobile and kingmakers less powerful in some communities. Kingmakers are dependent on public opinion and can be swayed and persuaded. We are a society of special interest groups, which may also influence the kingmakers.

The Rational-Comprehensive Model

In this model, the ideal way to make policy is suggested by the title of the theory. Proponents of this system say that ideally policy should be made in a logical, systematic manner. The steps to follow are:

- Consider and clarify values and objectives, separate from an analysis of alternative policies.

- Formulate policy by determining what is wanted as the end result; then objectively seek the means to attain the desired aim.

- Research the issue to determine the best policy and then use the evidence to prove the best course of action.

- Engage in comprehensive policy analysis, taking every important and relevant factor into account.

- Rely on theory, whenever possible.

The "Muddling Through" Model (Incrementalism)

Political economist, Charles E. Lindbloom, formulated his science of "muddling through" in 1959, in reaction to those who were touting the rational-comprehensive model. He asserted that in real life, rational models were not feasible or practical. According to Lindbloom, what happens is that things get done, a little at a time, in small increments. Lindbloom states that public policy formation is a result of existing policies and programs. In real life, policy makers do not annually review the whole range of existing public policy, identify goals, research costs and benefits, and select the best policy alternatives. Instead, policy decisions are made continually, building out from the current situation, step-by-step in small degrees. This model considers existing programs, policies and budgets as a base and concentrates on explaining new policy as an increase, decrease or modification of that base.

Which model can you identify as operating in your communities? Do some seem more likely than others?

The Role of Local Government in Community Issues

When local people are dealing with state or federal government entities, they usually have one of two ways of looking at government. They look at it in terms of government programs or in terms of tools.

If we simply consider government programs, we may be trying to fit the needs of our community or group to what is available, not to our unique needs. If we look at government as a tool, we can identify our needs, then develop a package that will begin to address our needs.

There are many tools available. Let's identify what we need, then make the tool fit our need. Government programs are tools that we can use to fit our needs.

There are four questions to ask when looking at government programs:

1. What are the programs? (Inventory the programs available.)

2. What are the rules? (Each program has its own distinct set of rules; look at and study these rules carefully.)

3. What is the language? (Know the semantics; know the language. Ask local or state representatives to help with the jargon.)

4. What are the implications? (Consider the implications of the rules and requirements for your group. Is it worth it? Do you want to jump through the hoops? What are the implications for all of the players in the system?)

City Government

This is a session in which a guest speaker may be most effective. The mayor, city manager, council person, county commissioner, or some other official can present the local perspective. To make the session meaningful, present an outline to the speaker of the material you wish to have covered. The outline might include the topics and ideas outlined below. If an outside speaker is not available, you may present the material yourself.

1. What is the structure of local government in the state?

   For example in Missouri, city government can fall into one of four categories. Each level allows successively more flexibility to the city in determining what structure fits its needs. The categories are as follows:

   - The village, administered by a board of trustees
   - A fourth class city, run by a board of aldermen, mayor, maybe an administrator
   - A third class city is the same as a fourth class, but allows for the appointment of a city manager
   - Home rule may be voted in by communities of over 5000 people who want to develop their own structure

   (A city administrator's duties are defined by ordinance; a city manager's duties are defined by the State legislature.)

2. What are the primary functions of local government?

   The primary functions of city government include:

   - Public safety — police, ambulance, fire

- Basic services — streets, water, sewer, electric, gas, airport, etc.

- Cultural services — libraries, recreational services, parks and recreation, senior citizens' complexes etc.

- Community services — general activities of administrative staff, problem resolution, maintenance

3. How do normal citizens get involved in local government? For example, they may:

   - Run for office
   - Serve on boards and commissions of the city
   - Serve on a special task force appointed by the mayor
   - Serve on community betterment commissions
   - Serve on advisory committees for special grants

Chapter 20

VOLUNTEERISM AND COMMUNITY ISSUES

by Michele Merfeld

WEEKLY SESSION 4.7 - TWO HOURS

HANDOUTS	Key Trends in the 90's Motivation of Me and Others Common Problems in Volunteer Groups
ADDITIONAL HANDOUTS	Trends and Changes in the Volunteer World The Practice of Excellence in the Volunteer World Motivating Volunteers Through Enhancing Their Competence *(See Appendix: Weekly 4.7)*
EQUIPMENT	Chalk board and chalk or flip chart and markers
OTHER PREPARATION	Depending on the needs of your group, you may wish to present a section on being an effective board member. You will have to do your own research on this, as it is not included in the materials.

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Lecture

Volunteerism. What can we say about volunteerism to a group like this? You are all volunteers and all leaders — whether you know it or not. You are most likely working on a voluntary committee of some kind right now. Through this course, we are attempting to help you create a vision of the type of leadership you can provide to volunteers in your community.

Motivating Volunteers

One of the most asked questions is, "How do you motivate volunteers?" To better understand what motivates others, let's find out a little about what motivates you as a volunteer.

EXERCISE:

Ask: "How many of you are currently volunteering?"

Ask participants to list the types of organizations and roles they are playing.

Ask: "What motivates you to be a volunteer? What challenges and excites you? What rewards do you seek?"

Ask each participant to write a list of five to 10 items.

Ask the group to share their lists. Write all items on the board (personal growth, good feeling, helping others, patriotism, values, newness, instinct, looking for a better way, good cause, application of skills and knowledge, health, emotional well-being, recruited by others, role models, your values, etc.)

How often were you satisfied when volunteering for something? When you have volunteered, who or what has kept you motivated? Who's responsibility is it to keep you motivated? What benefits have you personally experienced as a result of volunteering?

Elicit responses to these questions, one at a time, and list them on the board (new skills, new friends, self-confidence, memories, to fill time after retirement, making a contribution, developing personal characteristics, etc.).

Each one of you, are in part, a product of your generation. Your values, background, upbringing and experiences make you ideal volunteers. Some people believe that the younger generation may not be gaining the experience from groups that your generation has. The younger generation isn't learning the same social skills that you learned in groups. The younger generation isn't learning that working together in a group can be a successful venture.

The more you learn about yourself the more understanding you will have of different people and their different reasons for volunteering. Here are some important questions to ask yourself:

- Why am I volunteering for this club, organization, task? That is, what are my values? Remember the class discussion on working with people in small and large groups? (Session 4.2). Some people related to action, some to caring, some to structure and some to meaning. This may give you a clue to help answer this question.
- What excites me? What gets me motivated?
- What slows me down or frustrates me? What makes me want to throw up my arms and say, "It just isn't worth it!" Some people get frustrated much sooner than others.
- How do I relate to others? How can others tell me that I need to do something differently?
- What maintenance conditions do I need in order to operate at maximum level? Do I work best with others or on my own; morning, afternoon or evening; windows open or closed?
- Do I like a lot of new experiences or do I do better with things that are "tried and true?"

Key Trends for the Future

We will do an exercise to help identify some of the key trends and changes which are affecting us today.

EXERCISE: Distribute "Key Trends in the 90's."

Ask participants to divide into seven groups. Assign a topic for discussion to each small group. Instruct them to assign a recorder who will write down key points to report back to the large group. Ask them to discuss how each key trend will effect volunteerism. Flip charts may be provided for each group to summarize their discussion.

Ask each small group to report.

Throughout this course, we have been talking about a "new type" of volunteer. These trends all point to the need for this new type.

Roles for Volunteers

Several categories of volunteers have been identified, and they are:

Direct helpers. People who give direct help to others, usually on a one-to-one basis. Examples are transportation volunteers, respite care volunteers, tutors.

Decision-makers. People who serve on boards, commissions, councils, etc.

The connector or linker. The coordinator who links the volunteer with the client. For instance, a person who connects volunteers with schools in need of tutors.

The cause volunteer. People who like to work for a cause, such as the American Red Cross, the American Cancer Society, Humane Society, etc. Some people may be involved as advocates for a cause, others may be working as change agents within organizations.

The monitor volunteer. A volunteer who is recruited to monitor programs and functions and make sure they are being operated in accordance with policies and standards.

Motivating Others

Now that we have discussed some of the things that motivate you and some of the trends that will effect volunteerism, let's turn to the motivation of others. First and foremost, we need to be sensitive to the unique needs of each individual.

- What does this person need for recognition? What will make him/her feel cared for and important? Some people just need a friendly "glad you're here," while others might need a certificate to hang on the wall.
- What is the need for success and what kind of success?
- What is the need for growth and learning? You can't keep too many volunteers motivated if their tasks are repetitive and boring; most people need the challenge of learning new things.
- What is the need for creativity?

- What are the needs for support? Volunteers need differing amounts of supervision and training. Some work best completely on their own. Everyone needs positive feedback to know that they are appreciated.

- What are the needs for belonging? This might be especially important to retired people. Once you stop going to work everyday you lose your social group.

- What is the need for meaningful work? Most of you here can probably relate to this. You want to spend your time doing something important to you and others.

- Does the person have a need to solve his/her own problems?

- What about the need to give of themselves?

- Of course, we need to know a person's interests, resources, skills, knowledge and expertise.

- We also need to know about volunteers' other commitments. Our project might fit right in with some of their other interests.

EXERCISE:	Distribute "Motivation of Me and Others." Discuss any remaining points from the material.

Common Problems in Volunteer Groups

Too many goals. If you have done a careful analysis of your issue or problem, as we practiced earlier, your group will have a clear idea of the goals of the group. You can recruit specific people to carry out certain aspects of the task. If the group has become bogged down, go back to your issue analysis sheet to regroup.

Lack of an adequate contract. Most groups and organizations are not explicit enough about expectations for their members. Specific, written statements of expectations for each volunteer will greatly clarify individual responsibilities. Each volunteer could be asked to write his/her volunteer job description and then discuss it with the task force leader or group to make sure that everyone understands the other's point of view. Included in the job description should be the time and days available, the responsibilities of the volunteer, what specific roles the volunteer will play, and specific tasks with deadlines for accomplishment. Giving each member of the group a copy of each job description will help in coordinating the activity of the group. Build in time for review of each job description, either at a group meeting or individually with the leader.

Lack of attention to group process. Most volunteer groups do not give adequate thought to how they work together. All of the sessions on communication skills and listening can be put to use here. And remember individual motivations are also important; the desire of the person to contribute and/or the belief in the organization and its goals are a major factor in the willingness of volunteers to work as a group.

EXERCISE:	Distribute and discuss "Common Problems in Volunteer Groups."

Chapter 21

OPPORTUNITIES FOR INVOLVEMENT

by Anna Jean Wade and Carol Schultz

WEEKLY SESSION 4.8 - TWO HOURS

HANDOUTS	Prepare a list of organizations in the area which have leaders who are volunteers. Include a brief description of each organization. How To Order a Better Community *(See Appendix: Weekly 4.8)*
OTHER PREPARATION	This session will be most effective with a guest speaker or a panel of representatives from agencies and offices which use volunteers in leadership roles. Ask a few volunteers to speak about their positions or have a member of a community group describe a recent accomplishment. Lecture, if appropriate, developed by the facilitator.

……………

This is the wrap-up session. Time may be allotted to discuss future plans, to answer questions from previous sessions and to review the entire series. The material below will serve as a guide to developing the session, but is not intended to be used as a lecture.

*During this final session of **Leadership Enhancement for the Active Retired**, participants should be able to identify community groups and organizations which offer volunteers the opportunity to perform leadership functions. They should begin to identify opportunities to put their leadership skills to work.*

There should be an opportunity to review the program as a whole, plan for follow-up and generally review any material that there may be questions about.

For this session to be effective it must be planned, taking into consideration the needs and opportunities that are unique to each community. Although the session content will vary according to local focus the following plan can serve as a guide when preparing for this session.

Opportunities In Our Community

Prepare a list of organizations, boards, commissions, committees and agencies from the area that use volunteers in leadership functions. A letter could be drafted and sent to each. This would be an opportunity to tell organizations about LEAR and to explain its purpose and goals.

Organizations should be asked to furnish information about their program so that it can be shared with graduates of the leadership training program. The information requested might include:

1. *Name of the organization*
2. *Number of volunteer positions*
3. *Roles that the volunteers can fill*
4. *Special skills or talents needed*
5. *Time commitment required*
6. *Training available*
7. *The contact person (their phone number and office hours)*

The information provided by such organizations could be compiled and organized into a concise list for future use by the graduates of the program.

Examples of organizations that normally have volunteer boards, commissions, task forces, etc.:

1. *Health organizations*
    - a. *Local hospitals*
    - b. *Nursing homes*
    - c. *Mental health facilities*

2. Community governments

3. Education
    a. Local school districts
    b. Colleges
    c. University cooperative extension
    d. Parent-teacher organizations

4. Political organizations

5. State departments of social welfare
    a. Division of Family Services
    b. Area Agency on Aging
    c. Division of Aging
    d. Parole and Probation Board

6. Arts and culture
    a. Community festival committees
    b. Community music groups

7. Community action groups

8. Recreation
    a. State parks
    b. Department of Conservation

9. Religious organizations
    a. Ministerial alliance

10. General fund raising
    a. Heart fund
    b. Cancer fund
    c. The American Red Cross

The participants might benefit from hearing a panel discuss their experiences as volunteer leaders. They could describe how they became involved, the opportunities for involvement, projects they have worked on, and insights they have had as they carried out their roles.

The program leader/facilitator will need to synthesize and relate what the speakers or panel members say to the content in the training sessions.

Review of the Sessions

Review the handout on leadership skills from Session 4.1 (Chapter 14) to make sure that all have been covered. Briefly review the topics from each session to see if there are remaining questions. There may be a general discussion about how participants can use what they have learned. The group may wish to make plans for follow-up or for continuing to meet to work on a specific project.

EXERCISE: Distribute and discuss "How to Order a Better Community."

Follow up Ideas for Program Graduates

It is important that graduates of LEAR have an opportunity to be involved in purposeful activities that allow them to use the skills they have developed through the program.

Two ideas for possible activities for LEAR graduates are:

- *Formation of a permanent senior adult leadership group. This group could establish itself as a community board, providing imput to town or county government on issues having implications for older adults.*

- *Develop individual or team projects with established groups within the community such as the public schools, community colleges, local government, area agencies, or community projects groups.*

  Examples include:

- *Working with Cooperative Extension serving as leaders of 4-H groups, or as presenters of programs to extension groups.*

- *Working with the public schools to implement intergenerational programs with older citizens serving as mentors, tutors and role models for younger children.*

- *Working with the public schools assisting teachers through the Teacher's Aid Volunteer program.*

- *Working with local school boards to implement a latch-key program for children of working parents.*

- *Serve on existing committees in the local government such as the library, parks and recreation, or zoning and planning.*

- *Work on specific community projects festivals, history, tourism events, or organizing block groups for neighborhood safety.*

- *Work with area agencies on aging(AAA) as volunteers to improve the quality of life for older residents by assisting at Senior Centers or nutrition sites, helping develop a caregiver program for families of homebound elders, developing programs to assist isolated homebound elders, or serving as advisors to the AAA itself.*

- *Serving as leaders in church or church organizations implementing services and programs designed to meet the needs of older members.*

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Individual Leadership Skills

Task Accomplishment Skills

In the minds of many group participants, the most important feature of leadership is getting the task accomplished. Tasks may include reaching decisions, planning and implementing programs or projects, aiding personal growth and development, and building group capacity.

Certain task-oriented functions are necessary to group activity when selecting and achieving goals. These functions are initiating, elaborating, communicating, coordinating, information seeking, content knowledge, information giving, analyzing, diagnosing, summarizing, evaluating, and managing. Persons who perform such functions are leading the group. These functions may be accomplished by one individual or by several members of the group acting together. A person assigned, or assuming, a leadership role should be aware of these functions and facilitate their performance.

Initiating

To help the group make progress toward its goals, someone must initiate the discussion of topics and help the group in its transition through various stages of development. Proposing solutions, suggesting new ideas, providing new definitions of the problem, suggesting new attacks on problems, providing new organization of material, or suggesting procedures are all examples of necessary initiating activities.

Elaborating

Elaborating is a way to expand on existing information by clarifying information and giving it more detail. Clarifying includes giving examples or developing meanings, trying to envision how a proposal might work if it were adopted, defining terms, or clearing confusion.

Communicating

Effective communication exists between two persons when the receiver interprets the sender's messages in the same way the sender intended. The abilities to communicate clearly and to take into account the feedback that is given are crucial, if tasks are to be accomplished in a manner satisfactory to all involved.

Coordinating

Coordination ensures that group activities move toward a common objective. Coordination is the process of showing relationships among various ideas or suggestions, pulling ideas and suggestions together, trying to draw together activities of various subgroups or members, and trying to make sense out of the pieces.

Information Seeking

A group must seek information that will help it accomplish a task. This skill encompasses asking for information that is pertinent to the current needs of the group, and seeking clarification of suggestions. Also included is requesting additional information or facts regarding topics raised in discussion.

Content Knowledge

A sufficient base of understanding on a subject is needed in order to know what information is necessary to deal with a given situation. The leader must have sufficient knowledge about the topic to know when to ask questions, as well as to be able to evaluate the information presented.

Information Giving

A leader initiates many group activities, and often will need to provide information as a part of this process. Offering facts or generalizations and relating one's own experience(s) as illustrative of group problems are helpful behaviors.

Analyzing

Analyzing a task is a skill that involves being able to separate the task into various parts and understanding those parts as they relate to the task as a whole. Analyzing also involves the ability to deal with a variety of task and group conditions in diverse settings.

Diagnosing

Diagnosing involves identifying a problem and suggesting a remedy, or a way to deal with the difficulty. In diagnosing, one determines the sources of difficulties, suggests the next appropriate step, and identifies the main obstacles to progress.

Summarizing

Summarizing requires the skill to condense material so that it is clear and understandable, as well as making intuitive connections among the mass of information so that new insights may emerge. One aspect of summarizing is pulling together related ideas or suggestions and restating suggestions after the group has discussed them. Another aspect is offering a decision or conclusion for consideration by the group.

Evaluating

Evaluating group activities is a way of understanding how a group is progressing. Evaluation involves submitting group decisions or accomplishments to comparison with group standards, and measuring accomplishments against goals. Evaluating also involves helping the group and individuals within the group to measure how far they have progressed in learning and competencies.

Managing

Managing implies organizing people, as well as tasks. Managing requires foresight and a knowledge of what resources are at hand. Managing is the ability to plan, organize, and make assignments, and to guide the group toward its goal in a manner acceptable to the members.

Individual Leadership Skills

Personal Relationship Skills

The primary task of leadership is to accomplish some task, project, or program through the efforts of other people. Consequently, personal relationship skills are a necessary part of the leader's repertoire. Personal relationship skills discussed here are: listening, encouraging, providing feedback, praising, questioning, mediating, teaching and training, and maintaining discipline.

Listening

Good listening skills are at least as important to effective communications as are good speaking skills. Listening means really hearing what others are saying and accurately interpreting what they mean by their words and actions. Concentrating on the speaker, asking clarifying questions, repeating or reflecting on what the speaker has said, maintaining eye contact and open body language, and smiling are some of the actions that reflect good listening. Listening is an active process that involves hearing, understanding, and relating that understanding through verbal and nonverbal feedback.

Encouraging

Encouraging group members to participate in discussion creates a positive, open situation, and helps the group move from planning to implementation. Maintaining a warm, friendly, open atmosphere; praising others and their ideas; accepting contributions courteously and agreeing that they are important considerations are some of the encouraging behaviors needed to develop productive efforts in others.

Providing Feedback

Providing feedback to a group ensures that information is clearly understood, in the same way, by all group members. Clarifying concepts and information, reinforcing contributions, making sure the information is understood in the same way by all parties in a discussion are all methods for assuring others in a group that what they have to contribute is important.

Praising

Praising group members for their contribution is one way to encourage an open, participatory atmosphere. When someone makes a contribution to a discussion, recognize it and publicly praise it. The contribution does not have to be usable as it is, but can be accepted and praised as an important consideration. Often, the best ideas "come from left field," and, at first, appear to be unsuitable. Keep those ideas rolling by rewarding people for generating them, regardless of their immediate merit.

Questioning

Questioning helps the leader discover what the group members know and understand. This is a process of eliciting additional information and ideas by asking open-ended questions, or stimulating different perceptions by questioning the existing situation. All avenues should be explored in problem solving. One way of doing this is constant questioning of what is being done and eliciting new information from others. The leader must set the tone of interaction so that everyone feels comfortable asking questions and digging into the topic.

Mediating

Disagreements and conflicts are inherent in settings that encourage everyone to participate and speak out. When wide-ranging discussion occurs and many ideas are generated, disagreements will emerge, and conflicts may occur. A leader must be prepared to help find common ground between competing ideas and actions, and to offer intermediate or alternative solutions. Reinforcing common ground will encourage an integrated response to differences of opinion.

Teaching and Training

Effective teaching can create an environment that encourages learning, and can provide people with skills to continue this learning on their own. Teaching skills to others, by example and by discussion, is a means of improving interpersonal interaction. Providing knowledge and skills needed by the group to improve its productivity and the environment also are important. Creating the environment for learning, and encouraging it to happen, may be the most important functions the leader will fulfill.

Maintaining Discipline

Although encouraging creativity and openness are important goals for group leaders, maintaining discipline is needed to assure that everyone has a chance to participate and to maintain focus in the discussion. Making it possible for all members of the group to participate requires keeping some members limited in the amount of time they consume. Setting a time limit on speakers, keeping the members of a group on the topic, asking reticent members to comment, establishing (with the group) goals for group achievement, and mediating conflict are ways a leader maintains the disciplined direction of the group.

BRIEFING SHEET FOR WORK SESSION

Complex projects, club programs and activities are usually made up of specific parts which must be identified and dealt with if the activity is to be successful. But complexity is seen through the eye of the beholder and what is simple to one may be a maze to another.

By dividing the various efforts into critical parts and answering a series of questions about each one, a program of work can be developed and visualized. In some activities, legal or regulatory requirements may influence the information necessary.

First, is a **who** question. **Who** is going to be involved or effected and **who** must make decisions?

There are **when** questions. **When** must decisions be made and implemented if necessary time lines are to be met?

There are **where** questions. **Where** are the necessary decisions formed in the club meeting, project group, or by external sources such as city or county governmental agencies?

There are **information** questions. What **information** is needed by whom in what form?

There are **how** questions. **How** must the decisions be made: by a vote, in conference by elected or appointed officials?

There are **responsibility** questions. Who will carry out each of the tasks that have to be performed?

There are **strategy** questions. How will the task be carried out?

There are **resource** questions. What resources must the person or groups have available in order to carry out the activity?

COMMUNITY ISSUES WORKSHEET

ISSUE OR PROBLEM ____

Critical Parts of Problems	Who	When	Where	Information	How	Who is Responsible	Strategy	Resource

CASE STUDY

One of the local clubs in your area is engaged in developing a series of small flower gardens along a walkway in a local park. This walkway borders a stream which flows through the park and feeds into a large lake at the edge of the park. The lake provides considerable recreation for local people and is a major regional recreation attraction.

While developing the series of flower gardens, the group begins to suspect that the stream and lake are seriously polluted. Upon investigation with the public health department, they find this is the case. Many members of the club are alarmed over this situation but are having difficulty acquiring help in understanding how to deal with the situation.

They suspect that the pollution is coming from several sources. These include septic tanks from public institutions such as schools, hospitals, and churches.

The club members fear people will lose money if the lake becomes polluted to a much greater extent. Many have purchased retirement and recreational homes on or near the lake, and feel property values might decrease if the area becomes undesirable. They also want to determine if the pollution is also coming from resorts, boats, and homes on the lake. Tourism is a major industry in the area, and resident population is increasing. The local community has recently helped start six new local businesses and has attracted two new small plants.

SAMPLE COMMUNITY INVENTORY CARDS

Name:
Address:
Phone: Work:
Interests:

Abilities:

Name:
Address:
Phone: Work:
Interests:

Abilities:

Looking at Capacity, Not Deficiency

John McKnight

I want to tell you a story about one neighborhood and its experience with two forms of economic development.

Beginning in the 1960s in this neighborhood, new people began to arrive, and they were people who began to do an unusual thing. They began to conduct "needs" surveys. And as a result of these needs surveys in this lower-income neighborhood, they were able to establish that there were severe problems in housing, education, jobs, crime and health. And having established that, public policy began to respond, and new people began to appear.

Now, I can't tell you about all the new people who began to appear as a result of this new policy, I'll just tell you about the ones that I know myself. There began to come to the neighborhood people who were public housing officials, land clearance experts, housing development counselors, rodent removal experts, weatherization counselors, teachers' aides, school security advisers, civil rights consultants, job developers, job counselors, job classifiers, job location specialists, relocation program specialists, job trainees, small business advisers, correctional system designers, rehabilitation specialists, juvenile counselors, legal assistance attorneys, case managers, nurse aides, public health nurses, teenage pregnancy experts, doctors, psychologists, psychiatrists, health educators, home budget management trainers, lead inspectors, skills trainers, and administrators and managers to coordinate all the rest of them.

Each of the problems being addressed by these new professionals is reasonable if you think about the problem. If somebody says to me, "Do I want the neighborhood overrun by rats?" it is reasonable to say I do not. On the other hand, the price I have to pay is a rodent removal expert.

And so I think we have to understand that every inventory of needs sounds reasonable, but the result of that inventory of needs is the litany I just went over, which is an economic development plan for people who don't live in the neighborhood.

The second point is that much of this activity is privatized. So we shouldn't give government the full tab. We're talking here about a system that runs both through the private and the public sector.

The third point is obviously that the people who got the benefit from this approach to need are people who are not the people who have the needs. They are not the people who are affected. What happened here is an inundation of professional service personnel.

And finally, you should know that in terms of the actual dollars being spent, far and away the greatest amount goes into the medical system. The Community Services Association of New York City, one of the grand old social work agencies, attempted to isolate all of the public and private dollars that are allocated specifically for poor people—not all public dollars for programs, but specifically for poor people—and then try to capitize that; that is, if you took all those dollars and divided the number of people who are in the poverty category, how much money was available in New York City on a per capita basis? If you set the poverty line at 125 percent of the poverty line in New York City and take that number of people and divide it into the private and public dollars made available for helping poor people, the answer is that there was $7,000 per capita; $7,000 on a

per capita basis for about 20 percent of the population, or $20,000 for a family of four, which is about the median income.

But the second finding was that in terms of income only a third of the money was actually available in income or income surrogates, and two-thirds of it went for service professionals. That means that if, on a per capita basis, there was $7,000 available for each individual, only $2,600 reached that individual in cash. And of all of those dollars, one-half of it went for medical care.

So when one thinks about the major beneficiary of the welfare programs, public and private in the United States, the answer is the medical system. And I feel resentful, when I think about the folks I know in the neighborhoods where I have spent so much time, that people are talking as though they are the great beneficiaries of the welfare system. They are not.

This system that I've described in terms of the program and the money is a system based upon a basic focus for understanding problems, and that is *deficiency*. I have described to you the kinds of policies and programs that develop if you principally focus on the deficiencies in communities, if you principally focus on the emptiness. And if you focus on deficiency, you get the kind of misuse of the public wealth that I have described.

Incidentally, consider the difference in terms of the nature of the programs that we developed for GIs after the Second World War. We didn't surround them with a ring of service professionals. We gave them an economic key to educational systems and an economic key to home ownership. We valued our GIs too much to treat them like poor people and substitute service professionals for income.

In this same neighborhood recently, a group in the neighborhood organization undertook a different kind of activity, and it's an activity based not on deficiency but on capacity, and I want to describe it to you briefly.

14-A

They decided that there were a lot of people in that neighborhood with skills and abilities, and that nobody had ever looked over the neighborhood and said what we're going to do is a *capacity* survey. We're not going to do a needs survey. We're going to go through the neighborhood and try to find out what kinds of skills and abilities people have. So they began knocking on doors and going over people's life history. After they had gone to the first 80 apartments, and had talked mostly with women, they looked at the list to see what kinds of experience people had. The most common experience was some work in a hospital, work in a nursing home, work in a motel, or some work in home care.

Nearby is a middle-class neighborhood. So they put an advertisement in the newspaper saying home health care workers available, because they had 50 people who had that capacity. And the phone just rang off the wall. In fact, within one week they had all of the people with those skills placed in employment within eight blocks of the place where they resided. Fifty women immediately had the capacity identified and connected with the demand that was there. These women now have formed a club which has become the basis for mutual support and planning in terms of dealing with the child care issue. They are also developing the group into a cooperative business, and they are planning to use their purchasing power as the basis to support the development of a few new businesses in the community.

The neighborhood organization is also working with a corporation, the Roedale Corporation, which is developing a very simple method to go through neighborhoods to do demand studies—asking people if they need child care, if they need their houses repaired, if they plan to buy this next year, if they plan to buy that next year—so that they will be able to match the capacity inventories with the demands in nearby neighborhoods and bring together these two—the supply with the demand.

Now, the reason this has not been done everywhere is because people have focused on deficiency rather than capacity. And, secondly, we have not thought too much about development the way it's been thought about in the Third World.

In Third World development, what I have described to you is where you would start. You would start by saying what do we have now that people want now, that can pay for now. That's the beginning. That's the starting point.

Now, I believe in a good many neighborhoods across the United States that simple step will itself be the most efficient, highest return on investment possibility that there is for beginning to provide a base for some kind of entry into the private sector.

What are the policy implications of these two ways, the one that looks at deficiency, the other that looks at capacity? I think these stories suggest to me four basic policies.

The first is that we need to get the present public investment made available to the poor unhooked from its control by service professionals. The first thing I would suggest they do is to begin to reexamine all of our public and private welfare policies and try to give much more choice to people who are now being denied income because service professionals get there first.

So the first, clearest, simplest policy initiative before us is to attack the control of service professionals over the income that we have allocated for the benefit of the poor.

The second thing is to allow that income to be used in more versatile and creative ways and to encourage people at the neighborhood level to look at that income in other ways. For instance, why can't some of that income be used as an investment? Why can't some of it be used for education? Why can't some of it be used for training? We should begin to think about these transfer payments in terms of their reinvestment potential.

Third, we really do have to develop a serious method of giving incentives for people to transfer from public welfare into the private sector without losing all their money.

We need to make sure that people who enter the private sector and aren't getting paid very much won't lose all their public support. There's got to be a transitional system developed for many of these entry level jobs to work, or else a lot of our entrepreneurial talk isn't going to mean very much.

And, finally, it seems to me that we've heard over and over again today that people at the community level have to have control over the resources—not bureaucrats in Washington and not bureaucrats in the United Way.

We hear a lot about our society becoming a consumer society. Many of us even look at it as a good thing to be a client. I want to suggest to you that if you are nothing but a consumer, if you are nothing but a client, you have the most degraded status our society will provide; and that what we have done for many poor people is to say to them you are sentenced to be a consumer and a client, you are denied the privileges to create, to solve problems, and to produce. You are denied the powers of citizenship, the power to solve the kinds of problems that you have heard about today. We have a huge investment in the poor community. It has been captured by those who have, I believe, misused it, distorted it, and misdirected it.

I know from years in the neighborhoods that we can rely on community creativity. You have heard about it today over and over again. America is being reinvented little by little. in the most unordinary places; it's the most exciting thing that's happening in our country.

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FELT NEEDS AND ANTICIPATORY NEEDS: REFORMULATION OF A BASIC COMMUNITY DEVELOPMENT PRINCIPLE

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FELT NEEDS AND ANTICIPATORY NEEDS: REFORMULATION OF A BASIC COMMUNITY DEVELOPMENT PRINCIPLE

Abstract

"Felt needs" is a basic concept in community development. Felt needs are changes deemed necessary by people to correct the deficiencies they perceive in their community. The use of felt needs in community development practice involves the process of identifying needs, ranking their importance, and building programs based on the ranking. A frequent application of the concept is the methodology of needs assessment as a technique to gather data used for program definition and design. This paper explains why the concept of felt needs is inadequate for contemporary community development practice and needs assessment methodology is not an appropriate basis for program design. Felt needs are products of past-to-present orientation. Continuing to function on the basis of felt needs will contribute to community development becoming increasingly irrelevant and incapable of addressing today's major social and economic issues. Felt needs should be replaced by the concept "anticipatory needs", which identifies what needs to be done in order to move toward a specified future. Anticipatory needs are products of present-to-future orientation. The distinction is critical to the practitioner because felt needs and anticipatory needs are very different "needs" and, therefore, lead to different programming activities and patterns of relationships with community groups.

Background

Felt needs as used in community development are people's perceptions of their community's deficiencies (ECOP, 1966). Needs assessment frequently is the methodology by which those felt needs are articulated as something people want done (Christenson and Robinson, 1985). For the purposes of this paper, need is defined as the difference between what is and what people want. Felt needs refers to the process of assessment, setting priorities, and designing programs based on people's definition of their community's problems (ECOP, 1966).[1]

Felt needs has become such a basic element of community development that an activity which does not address a felt needs issue is not considered by most professionals to be proper community development practice (Littrell, 1984). The use of felt needs has its origins in both theory and practice.[2] In theory, it is the extension of the democratic focus of community development (Cook, 1985). By basing an action methodology on felt needs, practitioners have a sense the programs truly reflect the desires and needs of the affected audience. In practice, it is in response to the professionals' experience that successful development is best achieved through programming that reflects the desires of the people, because participation in program action is largely dependant upon the participants' roles in defining problems and determining felt needs.

Early writers providing an orientation to community development work were quite clear regarding the specification of their objectives and concepts. The use of "needs" was one of those concepts. As Cary (n.d.) notes, Lindeman (1921), in his delineation of ten steps in the community action process, identified the "consciousness of need" as the first step and discussed action based on "widely shared and focused consciousness of need" (Cary, n.d., p. 2). Steiner (1925) identified the lack of adequate diagnosis of local conditions and needs as one of the critical limitations on working with the development process. Sanderson and Poulson (1939) refer to the objective of satisfying "unmet needs" (Cary, n.d., p. 2-3). The emphasis on felt needs was an important principle in community development from the 1920's and 1930's as a part of the field's early conceptualization (Littrell, 1984). Because it was an effective means to develop a program agenda, defining needs became the basis for specifying program development objectives in most community development models (Stephens, 1987).

For most of the human experience, the future has been predictable and known since it is a straight line extension of the past through the present into the future. During those times, the use of felt needs and a focus on issues and problem solving is appropriate. What makes the situation in the 1980's and 1990's different and disjunctive with the past is that society has entered a period of major transformation. During periods of social transformation, there is a decoupling of the future (Drucker, 1986). Situations are neither known nor recurring, but are instead unknown and new.[3] The focus must shift from present contexts to future contexts.

The Dilemma of Community Development

The theory, principles, and practice of community development received full articulation in the 1960's, with the identification of felt needs as one of the basic principles. Community development as presently articulated is not designed to bring about change, but to improve community services, facilities and people's lives (Biddle, 1965 and ECOP, 1966). The intention is to bring individuals and groups "left out" into fuller access to the benefits of the democratic, industrial society. Therefore, the desired future is a given. The central goal is not change, but rather improving community service and facilities, living conditions, and material well-being and up-grading the quality of social amenities (Khinduka, 1975). Felt needs identify perceptions of past problems as manifested in the present. By connecting the present to the past, a development process based on felt needs results in an effort to have a future like the past, minus the problems. The result is an emphasis on problem solving to eliminate perceived deficiencies in various aspects of community life (Christenson and Robinson, 1980).

In general, community development practitioners use a problem solving methodology that reflects a deficiency orientation to development (McKnight, 1985). With this orientation, it is entirely appropriate that felt needs and problems be the basis for determining programming. But the world has changed and the community development profession has not. The context and challenge of development is no longer one of adaptation to what is, but now one of fundamental transition to a new social and economic order. Community development of the 1960's is still an excellent way to assist people in improving their present social amenities, but has become irrelevant to the broader, more central challenge of creating a new future.

What follows is a conceptual reformulation in which anticipatory needs replace felt needs as the basis for program design and implementation. The development emphasis shifts from correcting what is wrong to creating what will be, from deficiencies and problem-solving to capacity-building and capability. This also requires a shift in time perspective from the typically distinct entities of past, present and future to only two transitory orientations. The two orientations are present-to-past and present-to-future. We are in the now, the present, acting either (1) in response to the past or (2) projecting to the future.

Conceptual Reformulation

Because felt needs are expressions of experiences of dissatisfactions, they are reflections of past and current inadequacies; this type of orientation is adequate for program definition during times of stability and predictability. Because felt needs fail to address basic social change, they are not necessarily realistic or appropriate projections of future needs. Thus, felt needs, with the underlying premise that the future will closely resemble the past, are largely irrelevant during a transitional period of the type and magnitude presently being experienced.

Anticipatory needs express the changed perceptions and knowledge of an imaged future and, as such, create a bridge between the present and an otherwise disjunctive future. The challenge for community development practitioners is to change from a maintenance system of program design and delivery reflecting felt needs to a proactive one based on anticipatory needs. To do this, present reliance on felt needs programming must be replaced by a diverse set of futuring, anticipatory techniques.

Central to the formulation of anticipatory needs and techniques is a systems perspective, such as general systems theory as delineated by Laszlo (1983). He notes that general systems theory allows a full range of interdisciplinary approaches from which to address dilemmas. To use a general systems perspective, Laszlo argues, requires a freeing of "the mind from established concepts and theories to explore new concepts and new ways of structuring existing ones" (Laszlo, 1983, p. 49).

Anticipatory needs are derived from an understanding of where one wants to go. Anticipatory needs assessment is done by using "futuring" to specify where the education and programming should lead. Futuring involves envisioning the future in order to learn and define what futures may and can be. It is distinctive from the futurist writings which analyze the broad societal forces and changes in an attempt to speculate about what the world will become. The implication is that people will just be carried along by the broad dynamics and changes taking place. The impression is one of predetermination and inevitability, the modern fatalism. There is nothing about the future that can be done at the community level. This should not be confused with futuring, which embodies the various processes whereby a group of people can develop their own visions of what the future could be.[4]

Anticipation and participation are two primary features of the futures focus and the innovative learning process. Anticipation is best understood in contrast to adaptation. Whereas adaptation suggests a reactive adjustment to external pressure, anticipation implies an orientation that prepares for contingencies, and thus considers long-range future choices. Anticipation and constructive participation constitute a proactive approach to formulate and implement a new future purposefully. Innovative learning is the catalyst that promotes the constructive participation necessary to implement the strategies and actions indicated by the results of the anticipatory needs assessment.

During times of relative societal stability, developmental programming tends to focus knowledge and information on problem solving. For example, McKnight (1985), in his critique of programming based on assessment of felt needs, identifies thirty-one specific problems found in low-income neighborhoods. He further notes that in spite of numerous programs implemented to solve the problems, there has been little real change.

Desired "improvements" parallel that which is generally accepted as "correct". This is what Botkin, Elmandjra, and Malitza (1979) define as maintenance learning. "Traditionally, societies and individuals have adopted a pattern of continuous maintenance learning interrupted by short periods of innovation stimulated largely by the shock of external events... Maintenance learning is the acquisition of fixed outlooks, methods, and rules for dealing with known and recurring situations" (Botkin, Elmandjra, and Malitza, 1979, p. 10).

Effective, positive action must emerge from "innovative learning", a "type of learning that can bring change, renewal, restructuring, and problem reformulation" (Botkin, Elmandjra, and Malitza, 1979, p. 10). Innovative learning is designed to give the future understanding and relevance in the present. It is a way to prepare individuals and societies to act in concert in new situations. The learning itself will give definition to a new and changing sense of what needs to be learned (Botkin, 1979). Innovative learning deals with emerging issues. "It focuses on preparing organizations for action in new situations, requiring the anticipation of environments that have not yet appeared. There are no familiar contexts within which innovative learning can take place; indeed, the construction of new contexts is precisely one of its tasks" (Bennis, 1985, p. 194).

The process of defining anticipatory needs involves specifying the steps necessary to create a path into the community's desired future. The community development process becomes the development methodology for bringing innovative learning to bear on anticipatory needs in preparation for implementing the steps into the future.

Once anticipatory needs have been determined in the context of a systems approach that applies futuring and innovative learning, specific action objectives must be identified. These become the stepping stones from the community's present to its desired future.
Using anticipatory needs calls for change in the perspective of the development worker. A central practice principle in community development is that the process must start where people are and address the needs people identify collectively (Littrell, 1984). Anticipatory needs does that but with the time perspective that projects from the present into the future rather than into the past. The specification of needs is determined by people's definition of where they want to be rather than what is wrong with where they have been.
Anticipatory needs build the bridges to connect communities with the broad societal forces such as the globalization of the economy. The new linkage makes possible the creation of micro futures specific to a particular community. Much of the futurist writings and analyses tend to be macro in scope and thus ignore the micro-systems (communities and primary groups) within which people live their day-to-day lives. The implication is that people will just be swept along by the broad dynamics and changes taking place. This leaves the impression of predetermination and inevitability, i.e., "it" (the future) is out of our control. A more constructive view is that "what the future will be" has become an open question. Therein lies the excitement of the present, the potential for community development professionals to play an important role in the creation of a new future.

Conclusion

Unlike felt needs, anticipatory needs address the future in a context that assumes basic social change can be or will be directed by people in communities. In the practice of community development this is done by (1) determining the anticipatory needs and (2) designing programs to address those needs.

During a period of transition, critical challenges face community development practitioners. Yesterday's developmental needs involved reacting to and coping with change. Today's world requires a new framework that enables people to formulate and design their future, thus directing change. The central question asks how people relate to the changes taking place in the social context where they live and work. Futuring, innovative learning and anticipatory needs, will require practitioners to:

1. Gain experience in analyzing major social and technological dynamics that are making the future different;

2. Relate these dynamics and concepts to the local geographic and community context;

3. Learn and implement the concepts and techniques of futuring and innovative learning to determine anticipated needs;

4. Design programming to meet anticipatory needs.

Survey, census and historical data provide a way to describe what is and what has been. However, if a basic transformation is occurring from "what is" to "what will be", future projections based on linear extrapolation are inadequate, except to understand "what was." An effective community development practitioner must replace felt needs derived programming with anticipated needs' assessment and programming.

Community development is at a crossroads. Will the profession meet an untimely death while looking over its shoulder at the past for directional clues? Or will it step forward into the 2lst Century? Will the radical changes be made in theory, principles and practice necessary to convert the community development of the '60s to the community development of the '90s?

Footnotes

Jerry L. Wade is an Assistant Professor of the Department of Community Development at the University of Missouri-Columbia, Columbia, MO. An earlier version of the paper was presented at the Community Development Society meetings, Morgantown, West Virginia, 1987. Special thanks to Edge Wade and Don Littrell for help and encouragement in developing the concepts and critiquing the paper.

1. Although the literature on needs is quite extensive, for his definition, the author has drawn heavily on Cox (1984), Bradshaw (1974). and Monette (1977).

2. Two excellent discussions of the interweaving of theory and practice in the evolution of community development are Littrell (1984) and Cook (1985).

3. A wide variety of analyses are available which build the case that we are experiencing a major period of transformation in the basic structuring of the modern, industrial state. The reader is referred to the futurist writers such as Drucker (1986) and Naisbett (1982); discussions of the energy transition by Cottrell (1970) and Wade and Wells (1985); and the analyses of the new economic order by Morris (1982), Reisch (1985), and Alperovitz and Faux (1984). The videotape by Joel A. Barker (1986), "Discovering

the Future: The Business of Paradigms," provides an excellent perspective on transformation.

4. This paper has discussed the practical use of futuring only briefly because of the excellent program materials already available. The practitioner is referred to the works of Ayers (1979), W. Ziegler (1982 and 1984) and especially the excellent set of materials developed by Deshler (1988).

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side the notebook as the page immediately following the page with the "H".

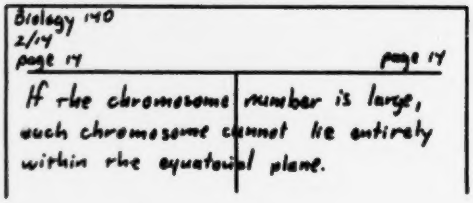
This procedure insures the proper placement for study of the handout during review and guards against losing the handout before review time.

BACKGROUND AND GENERAL INFORMATION

The main idea-detail relationship of the T-Note System cannot classify **background and general information.** This requires a variation of the T-Note master plan for recording and reviewing; therefore, students should record this type of information verbatim across the center line of the "T" filling both the right and left column (Fig. 5).

The review method for the background and general information is to reread the material until it is understood.

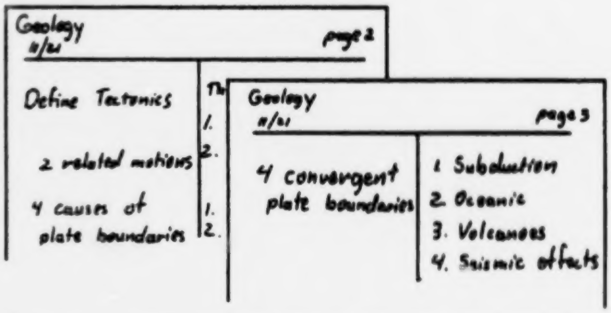
Figure 5


Biology 140
2/14
page 14
page 14
If the chromosome number is large,
each chromosome cannot lie entirely
within the equatorial plane.

REVIEW

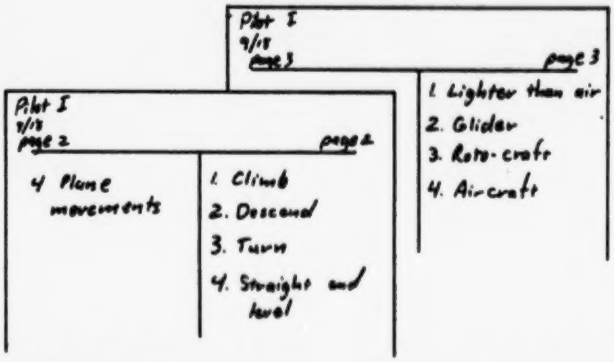
The T-Note System benefits students through a self-questioning review. First, the pages are removed from the notebook and overlapped so that the left column of the "T" is visible on each page (Fig. 6). The left column contains the main ideas, sometimes in the form of vocabulary words and visual aids. The main ideas should be read as questions to simulate an actual test question. The cues for each main idea should tell "how many" or what "type" of details the students are expected to recall. The self-testing should continue for all pages until students can recall all details which relate to the main idea.

Figure 6


Geology
9/81
page 2
Define Tectonics
2 related motions
4 causes of plate boundaries
Th
1.
2.
1.
2.
Geology
9/81
page 3
4 convergent plate boundaries
1 Subduction
2 Oceanic
3 Volcanoes
4. Seismic effects

The second step of the review process is to overlap the pages so that the right columns are visible. This permits a review in reverse so that students practice recalling the relationships of the details to the main ideas. For example, in this review process a student would be required to remember that: 1) lighter than air; 2) glider; 3) roto-craft; and 4) airplane are . . ." the four types of aircraft." This type of review should continue until the student can recite the main ideas established by each set of details.

Figure 7


Pilot I
9/18
page 3
page 3
1. Lighter than air
2. Glider
3. Roto-craft
4. Air-craft
Pilot I
9/18
page 2
page 2
4 Plane movements
1. Climb
2. Descend
3. Turn
4. Straight and level

SELF - TEST

The overlap review process for self-testing becomes even more effective when combined with the recording of complete (+) or incomplete (-) on the self-test. An incomplete sign (-) beside the main idea alerts the student to "chunks of information" which should be reviewed further (Fig. 6). For example, students who can name only two of the four "types of aircraft" would place an incomplete sign (-) beside the main idea. During the next review they should again try to recall all four types finally making a complete sign (+) beside the main idea when they have successfully recalled all four types.

When the students can recall all items on the same page of notes, that page can be removed from the pverlap review process. Students then concentrate their time to studying and recalling the more difficult information marked as incomplete (-).

Students who have successfully recalled information in both forward and backward overlap review will be more successful on examinations.

SUMMARY

The T-Note System provides students a master plan for recording and studying main ideas, supporting details, examples, vocabulary, visual aids, and handouts from classroom lectures. As a result of organized notes from class, students increase their ability to learn and recall lecture information in a smaller amount of study time.

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Note-taking with T-Notes

by Archie Davis and Elvis Clark

Success in the academic classroom depends on an effective note-taking and note-study technique. To be successful the student must be able to record and to study a variety of types of lectures information. The most frequent types of classroom lecture information is presented in the forms of: 1) main ideas, 2) details, 3) vocabulary, 4) visual aids, 5) examples, and 6) general ideas. With this in mind, the T-Note note-making plan helps the student by simplifying their recording of the lecture information and incorporating a unique *review* feature.

Students can use the T-Note System to make lecture notes and to study those notes. T-Notes have been successfully used in social studies, fine arts, mathematics and the sciences.

ORGANIZATION

Students must be able to organize meaningful notes from what they hear and see in the classroom The T-Note System organizes students' lecture notes by placing lecture information on the page according to its category; main ideas, details, vocabulary, visual aids, handouts or general information.

The T-Note System organizes six types of lecture information and makes possible a review strategy for all six types.

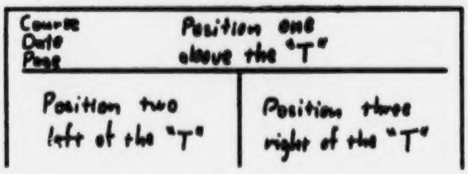
MATERIALS

To begin using the T-Note System students need a looseleaf notebook and standard notebook paper. Notes are to be taken in ink using one side of the paper only. Each page of the notebook paper should be divided into a large "T". Students should draw one line across the top of the page and a second line down the center (Fig. 1). This division establishes three primary areas for recording information; 1) above the "T"; 2) to the left of the leg of the "T"; 3) to the right of the "T".

LABELING OF THE PAGES

The area above the "T" is the location for identification of the course, the date and the page number. Each page should be identified (Fig. 1).

Figure 1



Course
Date
Page

Position one
above the "T"

Position two
left of the "T"

Position three
right of the "T"

MAIN IDEAS

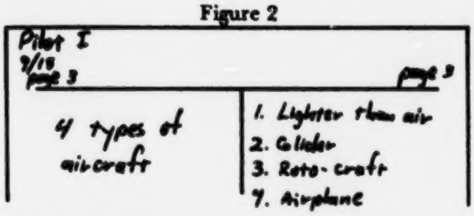
The lower left column below the top of the "T" is used to record main ideas, those words or phrases that will be followed by supporting information. Good teachers often give students a note-taking cue for the main ideas such as: "The four types of aircraft are. . ." The main idea is "aircraft"; in addition the teacher has signaled to the student that the details he intends to provide will be "four types." The signal and the main idea are combined in the left column to form the label "four types of aircraft." During the review of the lecture notes, students should combine the main idea, the label, and the cue into the form of a question, "What are four types of aircraft?"

DETAILS

Students using the T-Note System will record details in the right column. These details are written directly across from the main idea. Each specific detail and example should be placed on a separate line and numbered or labeled for quick location during the review of the notes (Fig. 2).

One main idea and the supporting details combine as one "chunk" of information. Students should skip one or more lines after each chunk to establish relationship of each main idea to its specific support.

Figure 2



Pilot I
9/15
page 3

page 3

4 types of
aircraft

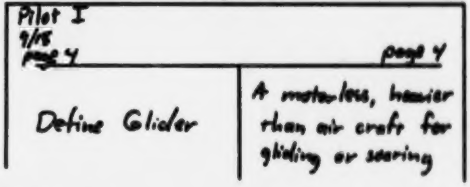
1. Lighter than air
2. Glider
3. Roto-craft
4. Airplane

VOCABULARY

Students must be familiar with the specialized technical vocabulary of a course. When technical words or phrases are new, each term and definition should be especially easy to locate during the review of the lecture notes. Students should write any new vocabulary terms in the left column of the T-Note because it is one type of main idea. The definition or explanation information is written in the right column (Fig. 3). This allows students to locate easily the vocabulary terms and definitions for review and study.

When important items are stated by the instructor and then carefully defined, students should assume that any such termswill be included on the next exam.

Figure 3



Pilot I
9/15
page 4

page 4

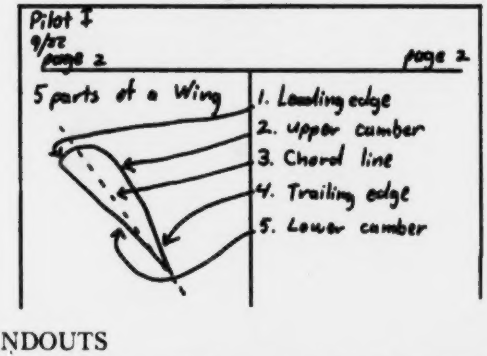
Define Glider

A motorless, heavier
than air craft for
gliding or soaring

VISUAL AIDS

During each lecture presentation some instructors use visual aids such as: chalkboard drawings, flip charts, transparencies, slides, and filmstrips. Using the T-Note System, students record visual information as a main idea. These visual main ideas should be sketched in the left column using one-fourth to one-third of the notebook page. Then the descriptive terms or labels should be listed in the right column. Connecting lines should be drawn from the pictures in the left column to the proper descriptive term in the right column (Fig. 4).

Figure 4



Pilot I
9/22
page 2

page 2

5 parts of a Wing

1. Leading edge
2. upper camber
3. Chord line
4. Trailing edge
5. Lower camber

HANDOUTS

Teachers who provide handouts with their discussion usually give handouts as they are needed to clarify points of the lecture. The T-Note System places this information within the lecture notes. Students using T-Notes should place a large "H" in the left column of their notes when they receive a handout and begin immediately to take notes on a new page. Later using a hole punch, they should place the handout in-

Perceptual Learning Styles Inventory

Check below the strategies/techniques through which you **think** you learn best.

1. ______ motion pictures
2. ______ lecture, information-giving
3. ______ group discussion
4. ______ readings as assignments
5. ______ role playing with you as a participant
6. ______ project construction
7. ______ odor discrimination activities
8. ______ television programs
9. ______ audiotapes
10. ______ participant in panel discussion
11. ______ written reports
12. ______ nonverbal/body movements
13. ______ drawing, painting, or sculpturing
14. ______ tasting
15. ______ slides
16. ______ records
17. ______ question-answer sessions
18. ______ independent reading
19. ______ physical motion activities
20. ______ model building
21. ______ scented materials (such as scratch -n- sniff)
22. ______ graphs, tables, and charts
23. ______ recitation by others
24. ______ interviews
25. ______ writing
26. ______ participant in physical games
27. ______ touching objects
28. ______ photographs

Please go to the scoring sheet when you have completed your checks.

Perceptual Learning Styles Scoring Sheet

CIRCLE THE NUMBERS YOU CHECKED ON THE PERCEPTUAL LEARNING STYLES INVENTORY

If a majority of numbers for a particular style are circled, consider the possibility that you may have a learning style similar to the one inidcated. Identification of your learning style orientation should identify ways in which to expand your learning effectiveness.

Strategy Numbers	Style
1, 8, 15, 22, 28	Visual
2, 9, 16, 23	Aural
3, 10, 17, 24	Interactive
4, 11, 18, 25	Print
5, 12, 19, 26	Kinesthetic
6, 13, 20, 27	Haptic
7, 14, 21	Olfactory

Source: James, W. and Galbraith, M. (1985). Perceptual Learning Styles: Implications and Techniques for the Practitioner. Lifelong Learning: An Omnibus of Practice and Research 8(4), 20-23.

Perceptual Learning Styles

Print - A person who is print-oriented often learns best through reading and writing. This is the learner who loves to read books, journals, or magazines and finds that he/she easily retains the information that is read. A person who is identified as a "bookworm" may be a print-oriented learner.

Aural - A person who is aural-oriented generally learns best through listening. People who usually do not talk much and who feel that they learn best when the information is presented verbally may be aural learners. Individuals who like lectures because they remember what is said or who enjoy learning from audio tapes probably are aural learners.

Interactive - Individuals who learn best through verbalization usually are interactive learners. These people like to talk and discuss ideas with other people. Small group discussions or the give-and-take of debate activities are several means through which interactive individuals learn best.

Visual - A person who is visual-oriented learns best through observation. People who like to see visual stimuli such as pictures, slides, graphs, tables, demonstrations, etc., usually are visual learners.

Haptic - Individuals who learn best through the sense of touch are generally haptic learners. A haptic person is someone who has to feel objects or to touch as many things as possible. Haptic persons assimilate information through a "hands on" approach to learning. This is similar to "tactile"; however, tactile refers only to touch through the fingers while haptic implies touch through the entire hand.

Kinesthetic - a person who is kinesthetically oriented learns best while moving. People who generally have to move around or have to move some part of their body while processing information probably are kinesthetic learners. Someone who is in constant motion while reading or listening may be a kinesthetic learner. Women who crochet or knit or men who work on leather projects during in-service workshops and who definitely comprehend the presented material are examples of kinesthetic learners.

Olfactory - Individuals who learn best through the senses of smell and taste are olfactory learners. People who can vividly associate some information with a particular smell or taste probably fall within this learning style.

Source: James, W. and Galbraith, M. (1985). Perceptual Learning Styles: Implications and Techniques for the Practitioner. Lifelong Learning: An Omnibus of Practice and Research 8(4), 20-23.

PEOPLE COMMUNICATE THROUGH SCREENS

PERSON A

PERSONALITY

ATTITUDE

VALUES

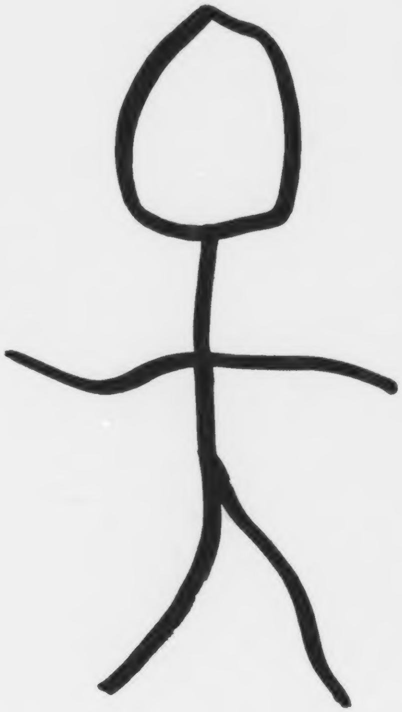
BIASES

BELIEF SYSTEMS

EXPERIENCES

ASSUMPTIONS

SCREENS



PERSON B

LIST OF FILTER MESSAGES

1. TELL ME I'M OK.
2. YELL AT ME.
3. ASK ME ABOUT MYSELF.
4. MAKE FACES AT ME.
5. BE GENTLE, I'M FRAGILE.
6. LISTEN TO ME AND GET ME TO TALK.
7. PUT ME DOWN BY THE WAY YOU TALK TO ME.
8. SPEAK GENTLY AND SOFTLY TO ME.
9. TOUCH ME WHEN YOU TALK TO ME.
10. DON'T LOOK AT ME WHEN TALKING TO ME.
11. LOOK AT MY SHOES WHEN YOU TALK TO ME.
12. TELL ME I'M STUPID, DUMB!
13. TALK TO ME AND USE YOUR HANDS.
14. SPEAK HARSHLY TO ME.
15. I'M INSECURE AND I WANT SOME HELP.
16. TALK AT ME WHILE I'M TALKING.
17. JUST SAY "A-HUM" WHEN I SPEAK TO YOU.
18. KEEP YOURSELF FAR AWAY FROM ME WHEN TALKING TO ME.
19. SPEAK TO ME LIKE EVERYTHING IS A CONFIDENTIAL SECRET
20. DON'T COME NEAR ME - KEEP YOUR DISTANCE.
21. I'M HAPPY. ASK ME, I'LL TELL YOU WHY.

Filter Messages (continued)

22. ALWAYS MENTION THE COST OF THINGS WHEN YOU TALK TO ME.

23. POOR ME. SHOW SYMPATHY TOWARDS ME.

24. HELP ME. I'M IN BAD SHAPE!

25. I ONLY TALK TO PEOPLE WHO "KNOW IT ALL".

Reference: Langdon-Dahm, Martha (1975). *Developing an Affective Learning System for Group Facilitators.* Centerville, Ohio: Learning Development Systems.

Poor Listening Habits: ABC Listening Sheet

Do not allow your partner to read this sheet.

As your partner is talking, keep track of the total number of words he or she uses that begin with "a", "b", and "c". Do not count the articles "a" and "an" and do not count the conjunction "and". Do not tell your partner what you are doing.

You can take part in the conversation, but be sure to keep an accurate score while your partner is talking.

A	B	C

Reproduced from

The 1987 Annual: Developing Human Resources
J. William Pfeiffer, Editor
San Diego, California: University Associates, 1987

Poor Listening Habits: NL Sheet

Do not allow your partner to read this sheet.

The "NL" in the title stands for "Not Listening". While your partner is talking, your task is to not listen. You may attempt to not listen in any way you like, as long as you stay in your seat. You may occasionally say something, but it need not relate to what your partner has been saying. Although your partner may realize you are not being attentive, do not tell him or her that you are deliberately not listening.

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The 1987 Annual: Developing Human Resources
J. William Pfeiffer, Editor
San Diego, California: University Associates, 1987

Poor Listening Habits: No Eye Contact

Do not allow you partner to read this sheet.

Carry on a conversation with your partner in a regular manner except do not make eye contact. Although your partner may realize something is different, do not tell him or her that you are deliberately not looking at him/her.

Poor Listening Habits: Separate Conversations

Both A and B will talk about a topic of interest to him/her. You will not respond to your partner's topic in any way. Just keep carrying on your own one-sided conversation.

Poor Listening Habits Theory Sheet

Most people spend more time listening than they spend on any other communication activity, yet a large percentage of people never learn to listen well. One reason is that they develop poor listening habits that continue with them throughout life. The following list contains some of the most common poor listening habits.

1. *Not Paying Attention.* Listeners may allow themselves to be distracted or to think of something else. Also, not wanting to listen often contributes to lack of attention.
2. "*Pseudolistening.*" Often people who are thinking about something else deliberately try to look as though they were listening. Such pretense may leave the speaker with the impression that the listener has heard some important information or instructions offered by the speaker.
3. *Listening But Not Hearing.* Sometimes a person listens only to facts or details or to the way they were presented and misses the real meaning.
4. *Rehearsing.* Some people listen until they want to say something, then quit listening, start rehearsing what they will say, and wait for an opportunity to respond.
5. *Interrupting.* The listener does not wait until the complete meaning can be determined, but interrupts so forcefully that the speaker stops in mid-sentence.
6. *Hearing What Is Expected.* People frequently think they heard speakers say what they expected them to say. Alternatively, they refuse to hear what they do not want to hear.
7. *Feeling Defensive.* The listeners assume that they know the speaker's intention or why something was said, or for various others reasons, they expect to be attacked.
8. *Listening for a Point of Disagreement.* Some listeners seem to wait for a chance to attack someone. They listen intently for points on which they can disagree.

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San Diego, California: University Associates, 1987

Poor Listening Habits: Effective Listening Sheet

One way people can improve their listening is to identify their own poor listening habits and make an effort to change them. The Poor Listening Habits Theory Sheet will help people to identify some of their own listening patterns. If the listeners will then pay special attention to the circumstances that seem to invite such behavior, they can consciously attempt to change their habits. For example, if a woman realizes that she is "pseudolistening" to her husband, she can stop him and ask him to repeat his last idea. She can even say, "I'm sorry; my mind was wandering." The more she becomes conscious of poor listening behavior, the more likely she is to change her poor listening habits.

Besides ridding themselves of bad listening habits, people can acquire positive listening habits. Listed below are a few descriptions of behavior that can lead to effective listening:

1. *Paying Attention.* If people really want to be good listeners, they must, on occasion, force themselves to pay attention to the speakers. When speakers are dull conversationalists, a listener must sometimes use effort to keep from being distracted by other things. It is important not only to focus on the speakers, but to use nonverbal dues (such as eye contact, head nods, and smiles) to let them know they are being heard.

2. *Listening for the Whole Message.* This includes looking for meaning and consistency or congruence in both the verbal and nonverbal messages and listening for ideas, feelings and intentions as well as facts. It also includes hearing things that are unpleasant or unwelcome.

3. *Hearing Before Evaluating.* Listening to what someone says without drawing premature conclusions is a valuable aid to listening. By questioning the speaker in a nonaccusing manner, rather than giving advice or judging, a listener can often discover exactly what the speaker has in mind — which many times is quite different from what the listener had assumed.

4. *Paraphrasing What Was Heard.* If the listener nonjudgmentally paraphrases the words of the speaker and asks if that is what was meant, many misunderstandings and misinterpretations can be avoided.

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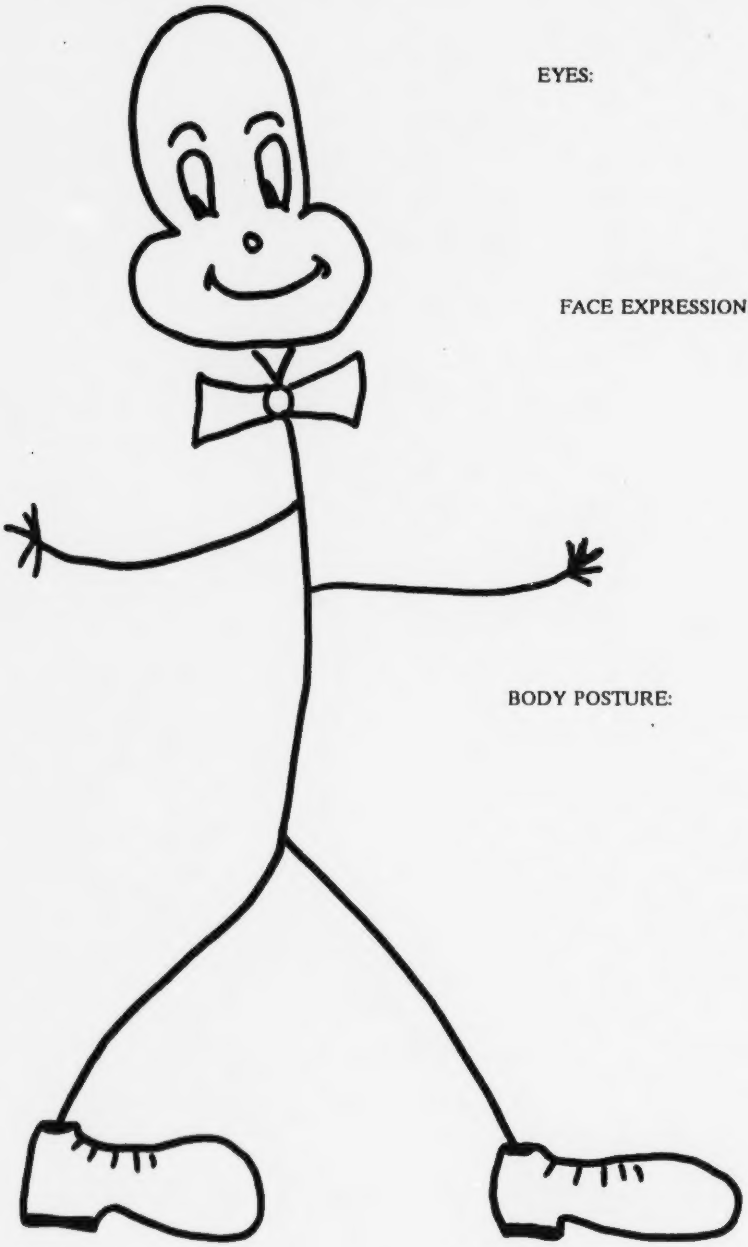
The 1987 Annual: Developing Human Resources
J. William Pfeiffer, Editor
San Diego, California: University Associates, 1987

NONVERBAL COMMUNICATION

I communicate nonverbally. Most of the time I'm not aware that I am sending messages nonverbally. Often I meet another's eyes and I quickly look the other way. Why? Sometimes I change my body posture when sitting, standing. I'm not sure why I do this. Maybe if I become more aware of myself, I'll send clearer nonverbal messages and others will receive the message I want them to receive.



EYES:

FACE EXPRESSION:

HANDS:

BODY POSTURE:

PERSONAL SPACE:

Source: Langdon-Dahm, Martha (1975). *Developing an Affective Learning System for Group Facilitators.* Centerville, Ohio: Learning Development Systems.

Classifying Levels of Listening and Responding

Level 1: The Un-related Response

The unrelated response is one which introduces a subject that is completely different from the one initiated by the first speaker.

Example: Speaker 1: I had an accident yesterday, but fortunately, no one was hurt.

Speaker 2: Have you heard that Mary and Charlie are getting a divorce?

Level 2: The Tangential Response

The tangential response is one which picks up on a word or thought contained in the statement of the first speaker, but which directs the discussion away from the purpose of the first speaker.

Example: Speaker 1: I had an accident yesterday, but fortunately, no one was hurt.

Speaker 2: Cars are a pain in the neck. Mine has been in the shop three times in the last two months.

Level 3: The Furthering Response

The furthering response is one which, either verbally or non-verbally, encourages the first speaker to continue on with what he was saying.

Example: Speaker 1: I had an accident yesterday, but fortunately, no one was hurt.

Speaker 2: Were you on the Beltway when it happened?

Level 4: The Feeling Response

The feeling response is one which focuses in on the feeling expressed or implied in the statement of the first speaker. Frequently, the second speaker will respond by also expressing his own feeling while acknowledging the feeling of the other.

Example:	Speaker 1:	I had an accident yesterday, but fortunately, no one was hurt.
	Speaker 2:	I can understand why you are relieved that there were no injuries.

There are several general statements that can be made concerning the levels of response. First, Level 1 and Level 2 responses shift the focus of the discussion from the first speaker to the second. In effect, they take the ball away from Speaker 1 and therefore are frequently self-oriented responses. Level 3 and Level 4 responses permit the first speaker to keep the ball, in that he is encouraged to continue on with his original point and his feelings are acknowledged and often accepted.

Second, Level 3 responses are often in the form of questions, seeking additional information from the speaker on the subject he has initiated.

Third, Level 4 responses are always furthering, since they speak directly to the feelings of the speaker and do not shift the focus away from him.

Last, there is an implied value judgement in the four levels; that is, Level 3 and 4 responses are better than Level 1 and 2 responses. This is not always the case. There can be many situations when the most desirable thing a person can do is to shift the focus away from a speaker. Perhaps someone has been dominating a discussion. A Level 1 or 2 response may be just the intervention needed to revitalize the group and their interaction. What is important is that one must be aware of the nature of his response and use the Level 1 and 2 responses when they are appropriate.

Additional Examples of Levels of Response

Level 1: The Unrelated Response

Speaker 1:	I was upset when Mary laughed at the teacher's discomfort.
Speaker 2:	Are you going to the party at Jane's house tonight?

Speaker 1: The most exciting thing happened to me a few minutes ago!

Speaker 2: Did I tell you about the new car I just bought?

Speaker 1: I'm really worried about the growing use of drugs in my son's junior high school.

Speaker 2: Next week our whole family is going on a vacation to New England.

Level 2: The Tangential Response

Speaker 1: I was upset when Mary laughed at the teacher's discomfort.

Speaker 2: My math teacher made a mistake in class yesterday and I was the one who pointed it out to him.

Speaker 1: The most exciting thing happened to me a few minutes ago!

Speaker 2: Let me tell you about the crazy thing I just did. It really turned me on.

Speaker 1: I'm really worried about the growing use of drugs in my son's junior high school.

Speaker 2: My daughter has told me that she will never use drugs, and I was quite relieved to hear her say that.

Level 3: The Furthering Response

Speaker 1: I was upset when Mary laughed at the teacher's discomfort.

Speaker 2: What had happened to cause the teacher to be uncomfortable?

Speaker 1: The most exciting thing happened to me a few minutes ago!

Speaker 2: Tell me about it. You look so excited, it must really have been something special.

Speaker 1: I'm really worried about the growing use of drugs in my son's junior high school.

Speaker 2: Do you have any evidence to indicate that drug use there is really increasing?

Level 4: The Feeling Response

Speaker 1: I was upset when Mary laughed at the teacher's discomfort.

Speaker 2: I'm really sorry to see you so disturbed. Tell me what happened.

Speaker 1: The most exciting thing happened to me a few minutes ago!

Speaker 2: You look so happy. It must really have been a very thrilling experience. I'd like to hear about it.

Speaker 1: I'm really worried about the growing use of drugs in my son's junior high school.

Speaker 2: That's a very real concern for all of us parents. Are you worried that possibly your son has already been experimenting with drugs?

THE ART OF LISTENING

Douglas Dunn, Community Development Specialist

How do you motivate people to take a more active part? How do you get community support? This is the second of a series of "magic elixirs" guaranteed to increase participation in your group and community.

Elixir # 2 – Listen

People want to be listened to. A person is motivated to achieve when he feels his ideas and suggestions are listened to and respected. A major cause of "apathy" is the failure of you and I to really listen.

Research shows that over half of those present in the average meeting are not listening at any given time. Why? Because we allow our minds to wander and fantasize; we become inpatient; we think about what we are going to say next rather than what the speaker is saying; or we prematurely judge a person and close our mind to what he has to offer. But we can change that. Practice the following skills and you will greatly increase your listening ability, and in turn have a tremendous motivating force on others.

- ***Stop talking.*** Let others express their view, too.

- ***Listen with a purpose.*** Tune in to what the speaker's objective is as well as what your objective is in listening.

- ***Listen for ideas rather than facts.*** When you listen for facts, you try to memorize them, and you get behind in your listening and lose track of the central idea.

- ***Pay attention to non-verbal clues.*** Voice changes, facial expressions, body movements, etc. This will improve your concentration as well as your understanding of what is being said.

- ***Take brief notes.*** Listen for ideas, rather than facts, and jot down just enough so you can recall those ideas.

- ***Attend.*** Sit up straight; look alert; make regular eye contact with the speaker; nod, smile, shake your head and say "mm-hm" or "amen, brother" in support of what was said that you like. In short, react to the speaker; show your feelings. Let him know you are alive and interested in what he has to say.

- *Reflect.* Ask questions. Summarize back to the speaker what you feel were key points he made. Such reflecting provides the speaker with feedback to insure that your understanding of what was said is consistent with his. It also shows that you were listening.

- *Remove distractions.* Shut the door; turn off the noisy fan; control your emotions; and be patient.

- *Practice.* Several times a day, stop, select a sound and concentrate on it and nothing else. Become aware of how your thoughts interfere with your listening.

In conclusion, attentive listening can be a tremendous motivating force. It indicates to the person speaking that you value him as an individual, and you are interested in and appreciate his ideas and suggestions — even though you may personally disagree with them. It builds his self-esteem. Also, you'll find that when you start listening to others, they start listening to you!

Assumptions About Communication (Often Hidden) Which Lead Us Astray

1. We tend to assume that what I say equals what you hear.
2. We tend to assume that we can know what something really is.
3. We tend to assume (or at least talk as if) the world "out there" is static.
4. We tend to assume that the world out there "falls into" the categories we have in our own language.
5. We tend to assume that things labeled alike can be treated alike.
6. We tend to assume we know, when we are actually making inferences.
7. We tend to assume we already understand each other.

"We can no longer shrug our shoulders and say we can't change people. In fact, people *like* change. What they resist is the *methods* managers use to put change through."

Compiled by Don Littrell

Some Reasons for Resistance to Change

1. The purpose for the change has not been made clear.

2. People have not been involved in the planning.

3. The appeal is based on personal reasons.

4. The norms and habits patterns of the community are ignored.

5. There is poor communication regarding change. When people don't know, they vote no. Single purpose volunteer organizations trap themselves in this one.

6. There is fear of failure. Provide the opportunity for people to learn. Remember when we discussed that most people would rather plead lack of interest rather than ignorance or fear. Fear of failure is one of the great fears that may be operating here.

7. The cost is too high or the reward for making the change is seen as inadequate. This can be emotional cost as well as monetary cost.

8. The present situation seems satisfactory. The community involved does not see this as a problem.

Conditions Which Have Been Found to Lesson Resistance to Social Change

1. People need time to consider that change is needed, so no one feels that something has been put over on them.

2. Change comes most easily when there is some provision for people to blow off steam. Don't move ahead so fast the opposition doesn't have time to organize.

3. Motivation affects a person's willingness to be an effective human resource. Resistance may be reduced if these factors are considered:

    - meaningful reward
    - relationship
    - initial success
    - opportunity to grow
    - appropriate involvement in decision making

4. Be sure people know the goals and the reason for the change.

5. Build a trusting community climate. Mistrust arises when people have inadequate and incomplete information.

Leadership Exercise
Looking at Your Leadership Skills

Look over the listed leadership skills. Assess yourself on each skill as follows:

1. Place a *plus sign* (+) before each leadership skill you *have* and *use* in groups and organizations.
2. Place a *minus sign* (-) before each leadership skill you *do not have*, or do not have at a level sufficient to use in groups and organizations.
3. Place a *question mark* (?) before each leadership skill that you are not sure whether you have, or have at a level sufficient to use in groups and organizations.
4. Circle the *one* or *two* leadership skills you would like to be able to use more fully and effectively in groups and organizations.

Leadership Skills

______ Initiating
______ Elaborating
______ Communicating
______ Coordinating
______ Information Seeking
______ Content Knowledge
______ Information Giving
______ Analyzing
______ Diagnosing
______ Summarizing

______ Evaluating
______ Managing
______ Listening
______ Encouraging
______ Providing Feedback
______ Praising
______ Questioning
______ Mediating
______ Teaching and Training
______ Maintaining Discipline

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TIP Sheet 19
Listening

Good listening skills are at least as important to effective communication as are good speaking skills. Listening goes beyond keeping silent. It is an active process that involves hearing, understanding, and relating the understanding through verbal and nonverbal feedback. The following suggestions will help improve listening skills:

1. Hear what is being said. Focus your attention.
2. Pay attention not only to the meaning of the words, but to the meaning of the body language and the voice inflections of the person speaking.
3. Maintain attentive body posture and facial expressions, such as eye contact, smiling, and nodding to show a positive interest.
4. Encourage the speaker to give more information by asking open-ended questions.
5. Reflect understanding and interest by paraphrasing what has been said, or by asking clarifying questions.
6. Empathize with the speaker. Put yourself in his or her place, and develop understanding based on the other person's perspective.

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TIP Sheet 20
Providing Feedback

Providing feedback to a group ensures that information is understood clearly, and in the same way, by all group members. This can be done, informally, in the following ways:

1. Pay attention to moments when feedback is needed, such as when there is confusion about some information, or when a lot of information has been discussed.
2. Ask questions that will clarify the information being discussed.
3. Paraphrase what has been said.
4. Try to create an overall view of what was discussed by relating the different bits of information.
5. Summarize the topics of discussion.

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TIP Sheet 21
Praising

Praising group members for their contributions is one way of encouraging an open, participatory atmosphere. Praise can be subtle, or quite open, as the situation requires. The following are some suggestions for giving praise:

1. Compliment the contributions to the discussion. Be spontaneous. Be specific. Be honest — don't overdo.
2. Show the importance of a contribution by repeating the information and incorporating it into the discussion.
3. Praise group members for their individual contribution, whether or not it will be used.
4. Distribute praise as evenly as possible, not favoring certain group members. Be sincere.
5. Give credit to the group for the final product, but thank each member, individually, for his or her contribution(s).

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TIP Sheet 22
Questioning

Questioning helps the group leader discover what the group members know and understand. There are many ways to ask questions, depending on the results the questioner wants to obtain. The following are some suggestions on questioning techniques:

1. Ask open-ended questions: questions that cannot be answered with a simple "yes" or "no", or with a single-word response.
2. Ask questions in a way that shows genuine interest in the response.
3. Ask questions that challenge assumptions and unclear ideas.
4. Encourage others to question.
5. Ask questions to clarify ideas for the group.
6. Ask questions of the group, in general, to stimulate discussion — or of individuals to draw them into the discussion.

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TIP Sheet 23
Mediation

Disagreements and conflicts are inherent to discussions that encourage everyone to participate and speak out. Conflict can stimulate new ideas, or bring people to a new awareness. However, for this to occur, the group must be helped to reach some satisfactory agreement. A leader who has good mediating skills can help the group work through its conflict. The following are some ways a leader can do this:

1. Make sure everyone in the group clearly understands the different issues.
2. Maintain the focus of discussion on issues. Do *not* allow attacks on individuals.
3. Help the group members recognize the interests they have in common.
4. Offer alternative solutions and seek others from the group.
5. Suggest various ways that the group might reach common ground.
6. Reinforce the common goals and objectives shared by the group.

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TIP Sheet 24
Teaching

Effective teaching should create an environment that encourages learning and provides people with skills needed to continue this learning on their own. The teacher or trainer concentrates less on giving presentations and more on helping people develop their skills through analysis and practice. The following are some suggestions for creating this type of environment:

1. Encourage group members to have a positive interest in group objectives.
2. Create an open atmosphere for discussion through acceptance, encouragement, and praise.
3. Let the discussion sessions be the focus of learning, so that members learn how to develop effective interaction.
4. Compliment group members who contribute to the session, whether their contribution is used or not.
5. Ask questions that stimulate thought and conversation. Group members will develop skills through practice.
6. Provide knowledge that will help the group develop its skills.
7. Teach by example. Be a model for the group.
8. Periodically take stock of where the group is in achieving its objectives and in learning what is occurring in group development. Do this with the group so the members will become more aware of what they are learning and accomplishing.

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TIP Sheet 25
Maintaining Group Discipline

Although encouraging creativity and openness are important goals for group leaders, maintaining discipline also is needed to make sure everyone has the chance to participate, and to maintain focus on the topic of discussion. The following are suggestions for helping maintain group discipline:

1. Start on time.
2. Help the group establish goals that it can achieve during the session.
3. Set time limits for individual speakers, if there is a problem with some individuals monopolizing the discussion.
4. Address questions to group members who are not participating, in order to draw them into the discussion.
5. Watch a conversation that strays to see if the discussion is productive, or simply wandering. The group can be brought back to the original discussion by commenting that the conversation seems to be off the center of discussion, or by asking a question about the original topic.

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TIP Sheet 26
Initiating

To help the group make progress toward its goals, someone must initiate discussion of topics and help the group in transition through various stages of development. Designated leaders can initiate many of the activities of the group. The following suggestions show some of the ways a leader can initiate discussion and group activities.

1. Introduce topics for discussion.
2. Suggest activities for the group to undertake in order to reach its objective.
3. Propose ways to coordinate activities.
4. Ask group members to seek information.
5. Suggest ways to solve problems that might arise.

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TIP Sheet 27
Elaboration

Elaborating is a way to expand on some given information; to clarify the information; to give it more detail. Elaborating will help group members work more cohesively toward accomplishing a task. The following are some ways to elaborate:

1. Repeat the main idea or ideas in concrete and precise terms.
2. Give examples to illustrate ideas and information.
3. Define unclear terms.
4. Elicit additional information and ideas from the group.
5. Provide additional information that will give the group more insight to the ideas being discussed.
6. Project how this information is useful to the task, by giving examples of how it might be applied.

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TIP Sheet 28
How to Communicate Effectively

Effective communication exists between two persons when the receiver interprets the sender's messages in the same way the sender intended. Through communication, leaders and group members influence each other to act. Effective communication involves sending effective messages, effective listening, and the use of feedback. The following techniques can help improve communication:

Sending effective messages:

1. Make messages complete and specific.
2. Make verbal and nonverbal messages congruent with one another.
3. Clearly acknowledge your own message by using personal pronouns.
4. Ask for feedback concerning the way your messages are being received.
5. Reemphasize key points.
6. Make the message appropriate to the receiver.

Effective listening:

1. Be attentive to the sender.
2. Process the message thoroughly by relating it to experiences, ideas, and feelings.
3. Take notes, when appropriate.

Using feedback:

1. Use descriptive, rather than evaluative, feedback.
2. Be specific, rather than general.
3. Solicit feedback; do not impose it.
4. Time the feedback so it is given at the earliest opportunity after the given behavior.
5. Use feedback to ensure clear communication.

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TIP Sheet 29
Coordination

Coordination ensures that group activities are moving toward a common objective. Coordination saves time and energy, and it improves the chances for having a satisfying outcome. The following are some suggestions for coordinating group efforts:

1. Have a clear view of the objectives the group wants to accomplish.
2. Understand the different activities required to reach the objective. Be sure the group understands the interrelationships of various activities.
3. Imagine how the activities will work together. If different subgroups are working on different activities, be sure they are communicating and sharing their progress.
4. Propose an order for the activities so that they complement each other.
5. Connect ideas or suggestions that will help to unite the various activities.

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TIP Sheet 30
Giving Information

A leader initiates many group activities, and often will need to provide information as a part of this process. The following are some suggestions for giving information to a group:

1. Give information when it will help the group accomplish a task.
2. Give information that is pertinent to the current needs of the group.
3. Relate the information clearly; give examples to illustrate the content of the information.
4. Make sure that all group members have the same understanding of the information; direct the information to everyone, and ask questions if there seems to be confusion.
5. Show how the information relates to the task at hand by applying it to specific areas of the task.
6. Do not dominate the group with information. Allow others to discuss and contribute their information.

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TIP Sheet 31
Analyzing

Analyzing a task is a skill that involves being able to separate the task into its various parts. However, this must be done in a way that results in a better understanding of the task as a whole. Analyzing a task will give the leader and the group a clearer understanding of the direction and magnitude of the task, and will enable them to coordinate the task accomplishment steps. Some suggestions for analysis are the following:

1. Know the content of the task to be accomplished.
2. Think about the principal components of the task, and try to break them down into their simplest forms.
3. Clarify the components by stating them in precise and straightforward terms.
4. Imagine how these simplified components will fit back together, and see if the task has become more understandable.
5. Repeat the first four steps if the task still needs clarification, and if there is time.
6. Anticipate how to coordinate the group's activities with the various parts of the task.

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TIP Sheet 32
Diagnosis

When we think of diagnosing, we tend to think in the medical sense of identifying a problem and prescribing a remedy. A group leader does the same thing when there is some difficulty within the group process, or related to the issue the group is trying to resolve. The following are suggestions on diagnosis:

1. Identify the difficulty.
2. Find its source.
3. Look for any interconnected issues relating to the difficulty.
4. Offer solutions for overcoming the problem.
5. Imagine the outcomes of these proposed solutions. What could be the results?
6. Compare possible results with the objectives of the group.

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TIP Sheet 33
Summarizing

Summarizing requires the skill to condense material so that it is clear and understandable, as well as to make intuitive connections within the material so that new insights emerge. The purpose of the summary is to help the group conclude an activity or discussion. Some suggestions for summarizing are:

1. Summarize the principal ideas of a group discussion or activity. This should reinforce the ideas that contributed to the group objective, and should provide a clear outline of what was said or done.
2. Ask for additions or corrections to your summary.
3. Tie together any loose ends in the discussion by connecting related ideas.
4. Propose a final decision or outcome.

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TIP Sheet 34
Evaluation

Evaluating group activities is a way of understanding how the group is progressing. The group's goals should be considered as much as the group's accomplishments. The following are some suggestions for helping the group evaluate its activities:

1. Be sure the group members have established objectives as they begin their interaction. These objectives include daily as well as long-term objectives.
2. Review what has been accomplished by the group. Encourage the group to identify its accomplishments.
3. Consider everything that was gained by the group, such as the ability to work better together, the boost in self-confidence, the subject-matter learning, and the achievement of personal development.
4. Compare these accomplishments to the group's objectives.
5. Encourage the group to decide how near it has come to reaching its objectives. Emphasize the positive outcomes the group feels it has gained. Discuss the areas in which group members feel they have fallen short of their objectives, and explore ways to improve the results.

TIP Sheet 35
Managing Group Activity

Managing implies organizing people, as well as tasks. It requires foresight and a knowledge of what is at hand. Managing skills are a combination of skills that include the following:

1. Prepare for meetings. Have an agenda. Invite the group to modify the agenda, and then use it.
2. Keep the discussion on track. Set some ground rules.
3. Attend to individual needs, and know what they are.
4. Make sure all group members are consistently on the same track of understanding. Check members frequently to be sure.
5. Make sure resources needed are available.
6. Be prepared to move on to the next step when the group is ready.
7. Summarize accomplishments periodically, and assess what still needs to be done.
8. When each session is over, make sure all group members know what is needed before the next session, and check with them in between to see if they need help.

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TIP Sheet
Building Accountability

Missed deadlines, misunderstood expectations, and "footdragging" all affect group performance. In most cases, "an ounce of prevention is worth a pound of cure." Work to establish "ownership" in the early stages of the group.

1. *Make norms and procedures explicit.* Make certain that everyone understands and "buys" the idea of deadlines, procedures, and accountability.

2. *Develop an explicit plan of work.* There is no substitute for an explicit plan of action. Clearly specify *who* does *what* by *when.*

- *Who?* Everyone knows who is doing what job.
- *What?* Each job is stated so that it is clear what it entails and when it is to be done.
- *When?* The deadline is clear (write it down). Use external deadlines (such as printer's schedule, announcement in mass media).

3. *Select the accountability pattern that works best for your group:*

- *Traditional:* each person reports to the same boss (leader).
- *Circular:* each person reports to the next person.
- *Pairwise:* each pair consults regularly on progress and problems.
- *Group:* each person reports to the group as a whole.

4. *Make the consequences of missing deadlines clear.*

- *For the group:* someone else is delayed; the project cannot happen.
- *For the person:* how to deal with someone who does not get things done.

5. *Make commitments public.* Record commitments in the meeting minutes and the plan of work, and, when appropriate, in newsletters or newspapers.

6. *Give credit.* If commitments are made public, give public credit to those responsible for a job well done.

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ILLUSTRATIONS
Ingrid McCutcheon

THE ART OF
DELEGATING

Delegating is one of the most critical elements in the management of nearly all organizations and programs. Successful delegating helps to involve all members in the activities of the group. Delegating is critical in accomplishing a variety of group activities, yet it is a difficult concept to implement.

Benefits of Delegating

First, let's look at the two major benefits to an organization:

1. Members feel they are a vital part of the organization.

   People join a group to contribute something to the organization. Not many people are content to make decisions for a group in which they volunteer. If they have a part in the actual implementation of the jobs that need to be done, they feel they have contributed something worthwhile to the organization. Often people have a limited amount of time and are willing to do part of a task. This makes them feel they are contributing to the whole.

2. The group can accomplish more.

   Delegating also allows the group to accomplish more tasks than would be possible if only one person did them alone. Getting more done makes the group members feel good about their input and about their program. They continue to make the program a success.

Difficulties in Delegating

Leaders may have difficulty delegating responsibility for these reasons:

- They may feel they are slighting their jobs as leaders/chairs if they delegate tasks to others.
- They may feel members don't have enough information to do the tasks adequately.
- It is easier for them to do it themselves than to tell someone else how to do it and then follow up to see that it is done.
- They may want recognition for doing it themselves.
- They think they have all the good ideas.

On the surface, these may seem like selfish reasons for not delegating tasks. However, many leaders may not be aware of the benefits of delegating or may not know how to delegate.

TEN STEPS TO DELEGATING EFFECTIVELY

The following ten steps will help any leader multiply the effectiveness of the organization.

1. Define responsibilities clearly. Describe freedoms and limitations. This allows for consistency.

2. When delegating, delegate complete segments rather than bits and pieces.

3. Maximize strengths by choosing the right people for the appropriate task. Determine strengths and weaknesses of volunteers and staff and delegate accordingly.

4. Provide adequate feedback. Be honest and accurate in assessment of how they are doing. Emphasize what went wrong, not who did it.

5. Set goals and performance standards together.

6. Provide support through sharing knowledge, information, and plans with them.

7. Give those with responsibility for implementing a program a voice in the decision making. Freely consult with those involved.

8. Commend and encourage. Reward accomplishments.

9. Let go! Fully delegate and allow for personal success or failure. Delegation also involves the transfer of authority.

10. Thank-you's after the job is done should acknowledge the contribution.

Remember: "Delegation does not eliminate work, it changes it."

DELEGATING TO COMMITTEES

Committees or working task forces are especially effective in working on portions of tasks. However, there are advantages and disadvantages to the committee structure. Let's look at some of these.

Advantages

The use of committees can make your organization more effective and productive. Committees can:

- Pinpoint and harmonize different views.
- Provide for integrated group judgment.
- Sift out important matters for consideration by the Board, allowing the Board to cover more ground.
- Secure cooperation of large numbers of people in plans.
- Form a training ground for new leadership.
- Help motivate -- the broader the participation in the organization, the deeper the interest and stronger the loyalty.
- Promote coordination of effort.

Other advantages of committee work include:

1. A small number of people working together creates more opportunities for each member to take part. For this reason, it is wise to keep committees relatively small. Of course, the size of the committee is determined by the nature of the task. Divide the total task among subcommittees if the task or committee size is too large.
2. Procedures and atmosphere can be more informal. In this environment, individuals are more likely to make a contribution and discussion tends to be more open.
3. If members are selected specifically for the job, committees will have persons genuinely interested in that task. Larger groups are often hampered in their progress because they include individuals who are not as interested, or who are unfamiliar with the problem.
4. Delicate, embarrassing, or controversial subjects can be handled more easily.
5. Committees are more flexible in their abilities to hold meetings and to consult outside experts or authorities.
6. It is much easier to convene a small group than a large one.
7. A small group can often reach consensus more quickly, particularly when a large number of choices is available. For example, they can narrow the number of alternatives the larger membership needs to consider.

Disadvantages

1. Action may be slower--various points of view must be clarified.
2. Responsibility may be divided too many ways.
3. The Board and/or staff may be allowed to avoid making decisions, particularly unpopular ones. They can simply fall back on the recommendations of the committee.
4. The rest of the group may avoid asking penetrating questions, leaving all the work to the committees.
5. Decisions may be confused via compromise--many minds must be brought together.
6. Managers often find working with committees difficult. They may have problems with group dynamics or developing sympathy with committees.
7. Using committees could become expensive if they are not managed correctly.

Preparing for Successful Delegating

In facing the issue of delegating, Marlene Wilson, author of The Effective Management of Volunteer Programs, offers this insight:

> "The single most helpful thing to me... was, and still is, being very honest and realistic about my own limitations, both in time and knowledge."

In her book she poses four questions crucial to successful delegation:

1. "Do I have enough confidence in myself that I will not only accept, but actively seek out volunteers (people) who know more than I do about a program area where I need help?"
2. "Am I willing to delegate significant parts of my program to qualified volunteers (and be glad, not threatened, if they succeed)?"
3. "Do the jobs I offer to high level volunteers within my program make a sensible, logical whole, or are they bits and pieces of busy work that give the volunteer little opportunity for satisfaction or growth?"
4. "Am I willing to shift from being a "doer" to being an "enabler?" In other words, can I become a good manager and find satisfaction in that?

References:
National Asociation of Student Cooperatives, 1983.
Wilson, M., The Effective Management of Volunteer Programs, 1981.

Family Community Leadership (FCL) is an educational program designed to encourage participation in public issues affecting families. It is a regional effort of Extension Homemakers Councils and the Cooperative Extension Services in Alaska, Colorado, Hawaii, New Mexico, Oregon, and Washington, funded in part by a grant from the W. K. Kellogg Foundation.

Issued in furtherance of Cooperative Extension work, Acts of May 8 and June 30, 1914, in cooperation with the U.S. Department of Agriculture, O.E. Smith, Director of Extension Service, Oregon State University. Extension directors from other participating FCL states include James W. Matthews, University of Alaska; Don Chadwick, Colorado State University; Neal P. Kefford, University of Hawaii; John Oren, New Mexico State University; and J.O. Young, Washington State University. Extension invites participation in its programs and offers them to all people without discrimination.

For information contact: FCL at the Western Rural Development Center, Oregon State University, Corvallis.

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DELEGATING TO COMMITTEES

ADVANTAGES

1. ALL MEMBERS CAN CONTRIBUTE
2. INFORMAL ATMOSPHERE
3. HAVE INTEREST OR EXPERTISE
4. "TOUCHY" SUBJECTS CAN BE HANDLED MORE EASILY
5. MORE FLEXIBILITY
6. EASIER TO MEET
7. CAN COME TO CONSENSUS MORE EASILY

DISADVANTAGES

1. ACTION MAY BE SLOWER
2. RESPONSIBILITY TOO SCATTERED
3. MAY GET BLAMED FOR UNPOPULAR DECISIONS
4. GROUP MAY NOT QUESTION COMMITTEE
5. DECISION MAY BE CONFUSED VIA COMPROMISE
6. MANAGERS MAY FIND IT DIFFICULT TO WORK WITH COMMITTEES
7. MAY USE UP RESOURCES OF WHOLE GROUP

Exercise No. 1

WHY NOT?

List reasons for why you have trouble delegating responsibilities to others. Be honest with yourself. You can only change the behavior you know about.

AWARD
REASONS
1
2
3

Do you:

1. Feel you're not doing your job?_____
2. Don't think member knows how?_____
3. Don't have time to instruct others?_____
4. Want the recognition?_____
5. Have all the good ideas?_____
6. Others______________________________

____

Exercise No. 2

BENEFITS OF DELEGATING RESPONSIBILITY

Have group member list possible benefits to organizations to which they belong if the leadership would delegate more of the tasks and responsibilities.

Exercise No. 3

DELEGATING CHECK SHEET

In the most recent experience of delegating work, did you follow the ten steps?

10 steps	**Your score**		
	Great	OK	Need to improve
1. Define responsibilities clearly			
2. Delegate complete segment			
3. Choose appropriate people for the task			
4. Provide feedback			
5. Set goals and performance standards together			
6. Provide support			
7. Involve those who would implement the program			
8. Reward accomplishments			
9. Let go of authority			
10. Remember the "Thank-yous"?			

TIP Sheet
Moving On

Groups transform. Members come and members go. Changing priorities may require breaking away from a group. Group roles are often temporary, and there are always other groups with which to work.

Holding On

Letting go can be difficult. There are several reasons why we hold on:

- *We may fear that the group will fail without us.* This reason probably is false (we really are not indispensable). If we *are* the only thing preventing collapse, maybe the group has outlived its purpose.
- *We may fear not being needed.* If our role is to facilitate, to work with, then we have *succeeded* when we are no longer needed. Not being needed by one group allows us to move on to where we *are* needed; there is little chance of running out of work!
- *We may have succumbed to tradition.* ("I have always met with that group") We may be unaware of this powerful pressure, even as we are overwhelmed with commitments. Being locked into traditional roles reduces energy available for personal and professional growth in other directions.
- *The group may resist letting us go.* Members may have become dependent on us, unsure of their own capabilities. Or they may see us as "free staff assistance." Learning to rely on their own resources can strengthen group cohesion and commitment.

Letting Go

- *Plan ahead.* Careful planning assures graceful exits. When organizing a group, decide whether your role is to be convener only, convener and leader, convener and group member, convener and facilitator, or what. Communicate your role from the outset. Set a date for "turning over the reins," and occasionally remind the group of this date.

- *Consider "how things look".* Your departure must not appear to discount the group's importance or demonstrate some displeasure with the group, but rather to confirm that the group is capable on its own.

- *Consider gradual disengagement.* To disengage gradually from the group, reduce your level of participation, the number of meetings attended, and responsibilities accepted; identify existing and new leaders; delegate responsibilities to new and emerging leaders; or support leadership development workshops.

If you choose to remain in the group, you may redefine your role from leader or organizer to technical assistant, advisor, facilitator, or recorder. These roles allow you to have input without dominating, or to work behind the scenes without reinforcing dependency.

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Four Corners Theory Sheet

Working together effectively is the key to group productivity. Three components play a role in the ability of group members to work together effectively; the individual member, the group as a dynamic in itself, and the organizational structure within which the group functions. If these three components can come together harmoniously, the organization will profit from the connections among the three.

The Individual:

Carl Jung (1923) explained that people are equipped with four mental functions: two contrasting ways of perceiving (sensing and intuition) and two contrasting ways of judging or coming to conclusions about what is perceived (thinking and feeling).

People perceive the world through their five senses and through their intuition. From childhood people begin to rely on either their senses or their intuition more than the other; the one that an individual relies on becomes dominant in his or her life. Sensing people pay close attention to data provided by their senses. They are interested in immediate experience, literal facts, and concrete realities. Action is what drives them. Intuitive people need to find associations or connections among things and are interested in theories and imagined possibilities. Meaning is what drives them. People who prefer sensing develop differently and are motivated by needs different from those of people who prefer intuitive perceptions. Sensing people tend to want things to happen now, whereas intuitive people tend to wait until they are clear about why.

All people judge or draw conclusions about what they perceive. There are two ways of coming to conclusions: 1) "thinking" judgement, which is an impersonal process and is logical, orderly, and analytical; and 2) "feeling" judgement, or appreciation, which is a more personal, subjective process. Feeling people tend to be interested in human values and harmony and to be motivated by caring. In contrast, thinking people tend to like structure in their lives. As is the case with perception, each person starts to prefer one kind of judging over the other; and this mode of decision making becomes dominant.

Because each individual may prefer either of two kinds of perception and either of two kinds of judging, all individuals can be classified under one of four categories: 1) sensing thinkers, who need action and structure; 2) sensing-feeling people, who need action and caring; 3) intuitive thinkers, who need meaning and structure; and 4) intuitive-feeling people, who need meaning and caring. In addition, people are usually drawn especially to one of the four driving forces (meaning, structure, action, or caring).

TASK AND MAINTENANCE RELATED QUESTIONS

Task Related Questions:

1. Were the group's tasks, goals, or objectives clear to all members?
2. Did the group stay on task?
3. Was the task too rigidly structured?
4. Was there adequate information or experience within the group to accomplish the task, or was additional data needed?
5. Was the task accomplished?
6. Was responsibility for progress shared?

Maintenance Related Questions:

1. Did the group focus at any time on feelings?
2. Did you feel accepted?
3. Did you take a risk? What happened?
4. Did anyone take a risk which no one observed at the time? What happened?
5. How involved were you? Why?
6. Were you satisfied with the group session?
7. Did you feel uncomfortable in the group?

Self-Oriented Behavior Related Questions:

1. Were you at any time into a self-oriented role? i.e., Aggression, Blocker, Dominator, Recognition Seeker, etc.
2. Did anyone receive feedback on playing a self-oriented role? What happened?

Positive
Group Roles

Task Roles

1. ***Initiator:*** Proposing tasks, goals or actions; defining group problems; suggesting a procedure.
2. ***Informer:*** Offering facts; giving expression of feeling; giving an opinion.
3. ***Clarifier:*** Interpreting ideas or suggestions; defining terms; clarifying issues before group.
4. ***Summarizer:*** Pulling together related ideas; restating suggestions; offering a decision or conclusion for group to consider.
5. ***Reality Tester:*** Making a critical analysis of an idea; testing an idea against some data trying to see if the idea would work.

Maintenance Roles

1. ***Harmonizer:*** Attempting to reconcile disagreements; reducing tension; getting people to explore differences.
2. ***Gate Keeper:*** Helping to keep communication channels open; facilitating the participation of others; suggesting procedures that permit sharing remarks.
3. ***Consensus Tester:*** Asking to see if a group is nearing a decision; sending up a trial balloon to test a possible conclusion.
4. ***Encourager:*** Being friendly, warm and responsive to others; indicating by facial expression or remark the acceptance of others' contributions.
5. ***Compromiser:*** When his own idea or status is involved in a conflict offering a compromise which yields status; admitting error; modifying in interest of group cohesion or growth.

NEGATIVE
GROUP ROLES

1.	Aggressor:	Deflates other's status; attacks the group or its values; jokes in a barbed or semi-concealed way.
2.	Blocker:	Disagrees and opposes beyond reason; resists stubbornly the group's wish for personally oriented reasons; uses a hidden agenda to thwart the movement of the group.
3.	Dominator:	Asserts authority or superiority to manipulate the group or certain of its members; interrupts contributions of others; controls by means of flattery or other forms of patronizing behavior.
4.	Playboy or Playgirl	Makes a display of his lack of involvement; abandons the group while remaining physically with it; seeks recognition in ways not relevant to group task.
5.	Recognition Seeker:	Works in various ways to call attention to himself; boasts; reports on personal accomplishments struggles to prevent his being placed in an inferior position.
6.	Help Seeker:	Attempts to call forth sympathy from group through expressions of insecurity, personal confusion, or self-deprecation.
7.	Special Interest Pleader:	Speaks for the "small business man," the "grass roots," the "housewife," etc., usually cloaking his own biases in the stereotype which best fits his individual need.
8.	Avoidance Behavior:	Pursues other subjects to avoid commitment; prevents group from facing up to controversy.

Suggested Activities for Facilitators
Serving a Group

1. Arrange group so that all members can see one another and are comfortable. Let all stay seated during discussion, including facilitator.

2. If group size allows, ask each member to introduce themselves. Try to learn the names of all group members as quickly as possible.

3. Keep the discussion informal, and the spirits high. Encourage ease, informality, good humor; let every-body have a good time. Foster frank disagreement, if it occurs. Listen with respect and appreciation to all ideas, but stress what is important to the group, and try to turn discussion away from what is apparently not of interest.

4. Take time every ten minutes or so to draw the loose ends together: "Let's see where we've been going." Be as fair and accurate in summary as possible.

5. Help the group to clarify its objective so that the purpose of the meeting is clear. Let the group build the agenda out of its own needs, but keep it limited to the task upon which it is working.

6. Try not to direct questions to particular group members, unless you see that an idea is trying to find words there anyway: "Mrs. Brown, you were about to say something." When encouragement is needed, try to bring about additional discussion indirectly, i.e., "Let's have some discussion of this question...," "What do some of the rest of you think about this?" etc.

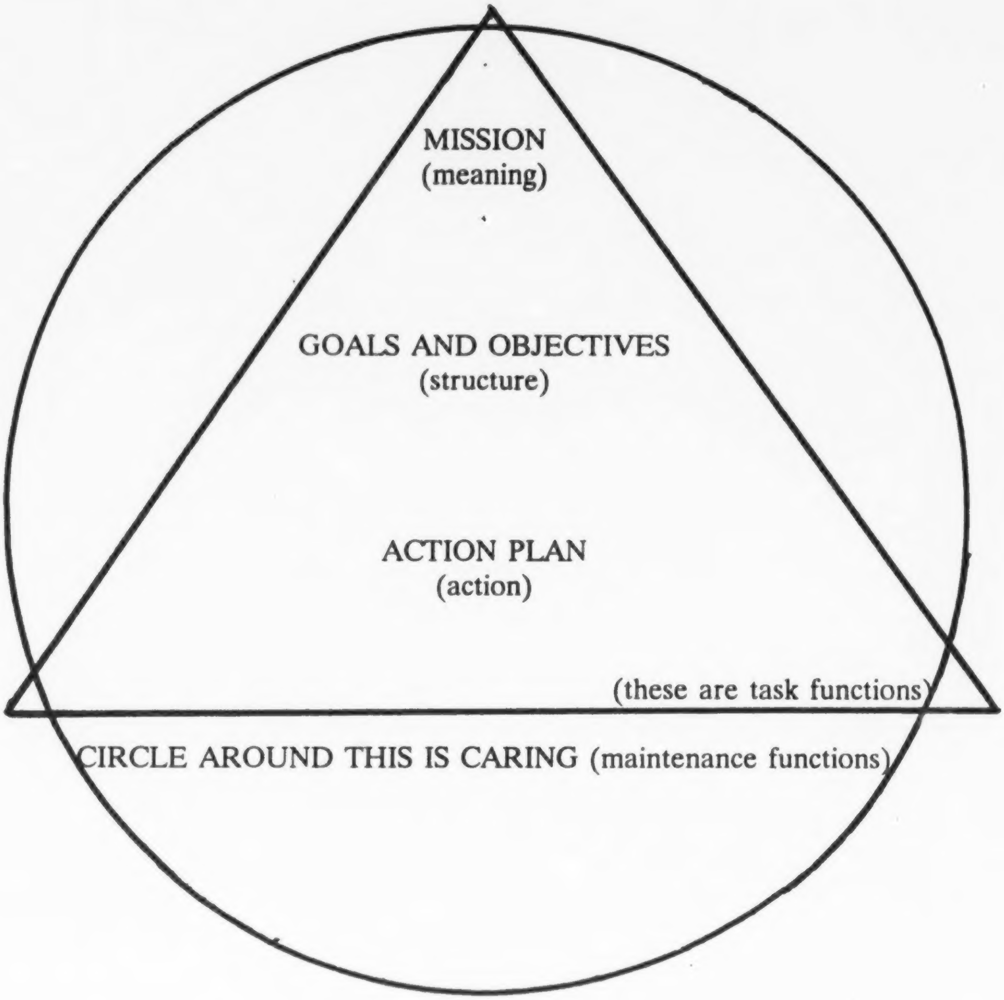
7. Interrupt the "speech maker" as tactfully as possible: "While we're on this point, let's hear from some of the others." "Can we save your other points until later?" The discussion will therefore remain "on the track".

8. The leader's opinion does count in the discussion, but keep your own view out of it as much as possible. Your job is to get the ideas of others out for an airing.

9. Call attention to unanswered questions future study or for reference back to speakers. Nourish a desire in group members for continuing study and discussion through skillful closing summary.

10. Close discussion with summary — the secretary's, the observer's, the recorder's or, if necessary, your own.

Group Functions


MISSION
(meaning)
GOALS AND OBJECTIVES
(structure)
ACTION PLAN
(action)
(these are task functions)
CIRCLE AROUND THIS IS CARING (maintenance functions)

Extension Information • University of Missouri-Columbia • 1-98 Agriculture • Columbia, Missouri 65211 .

Checklist for Planning A Successful Meeting

Schell H. Bodenhamer
Associate Dean-Emeritus for Extension
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Much time, energy and other resources go into planning and holding meetings. The purpose of a meeting should be to bring about desired change in a specific group of people or target audience. This change could be in terms of knowledge, skills, attitudes or aspirations. A meeting can be judged successful to the extent planned objectives are reached. Success is viewed from both the standpoint of those planning the meeting and the target audience.

Good meetings aren't accidents—they are caused by good planning. Probably 50 percent of meetings are "bores." Chairs are like T-squares, air is bad, a sleepy atmosphere prevails, and after a long hour talk, there is no time or energy for questions.

To help in planning meetings, here is a checklist of major elements essential for success.

Planning for the Meeting

__ • Decide a meeting is the most effective method to provide the desired learning experience.

__ • Effectively involve a planning committee including representatives of those expected to attend.

__ • Define in writing the objective that is to be reached. This should include: (a) the audience to be reached, (b) the behavioral change expected, and (c) what is to be taught.

The Audience

__ • The audience is the individual or group who is to attend. Many times meetings are called with only a general or vague idea of who is to attend. Sometimes the message is defined first and sometimes the audience. In all cases clearly define the message, the audience, and their interdependence.

Defining and Presenting the Message

__ • Decide on the techniques (ways) to present the meeting message to most effectively bring about desired change in the audience. Techniques have been likened to a vehicle which helps move a group toward its goal.

Some of the techniques that can be used are: lecture, movie, slide-cassette, video-cassette, tape recording, buzz groups, question and answer session, panel, posters, written materials, and demonstration. The techniques used should be those that will have the greatest impact on the audience to accomplish the meeting objective. Audience participation tends to increase learning or desired change.

The Meeting Place

__ • Select a meeting place that best matches the audience, message, and desired techniques. Give consideration to: size, comfort, seating arrangement, easy to hear, easy to see, easy to get to, adequate parking facilities, meeting place "acceptable" to the group, can be darkened if desired, well ventilated, and conducive for audience to communicate among themselves. If meeting place is larger than needed, stack extra chairs or rope off back rows.

Meeting Responsibilities Assigned and Accepted

__ • Those expected to help have been involved in planning the meeting. There should be a mutual undestanding of the purpose of the meeting; the specific assignments and how they fit into the total program; personal commitment; and dates, time, and place for desired input. Prepare a written summary of assigned duties so all who help know who is responsible for what.

Audience Recruitment and Preparation

__ • Develop a strategy for audience attendance. This should include developing a list of names and addresses of the target audience. The "you all are invited" method seldom works. The methods used to get attendance should be adapted to the specific situation. Variables include: existing level of interest; number of people; geographical location; advance scheduling and notification; methods to be used to recruit and reinforcement needed. Mass media can create awareness but more personal contacts should follow and reinforce.

__ ● Prepare the audience for the meeting. This includes: letting them know the purpose so it appears important to them personally; give the time, place and date; provide information on who will attend; let them know of prior preparation needed and what they need to bring; send an outline of the program; and build their level of interest and readiness.

The Speaker (if any)

__ ● Select a speaker who is well qualified on the subject. Make sure the speaker is scheduled well ahead of time; is briefed as to the audience, the subject, time limits, and over-all program; is informed if a written copy of the speech is desired and time expected; provides a biographical outline for introduction; and arrangements are made for lodging, expenses and needed equipment.

The Meeting Day

__ ● Arrive well ahead of time to make sure all is in readiness. This includes: meeting place unlocked; proper room arrangement; needed equipment available, working and in the right location; room clean, comfortable and properly ventilated; any refreshment or meal plans confirmed; and to be available for last minute requests and emergencies.

__ ● Greet the audience and make them feel welcome; provide for registration and readable name tags, if desired. Assign most responsibilities to others so you will be available to take care of unexpected needs.

__ ● Someone should meet the speaker(s) and make sure last minute needs are met. Someone should be assigned to greet the speaker(s) and to help with set-up, during the presentation and take-down.

__ ● Provide for a learning experience related to the meeting message for early arrivals. This could be publication display, newspaper clippings, posters, specimens, automated slides, etc.

__ ● Have adequate stand-up breaks and recesses.

__ ● Make sure the program starts, progresses, and ends on time.

__ ● The introduction of the speaker should be brief and properly prepare the audience for the speaker.

__ ● Make adjustments to make certain the audience can see and hear, participate, and are alert and comfortable.

Evaluation of Meeting Results

__ ● An evaluation plan should be developed before the meeting. The evaluation should be done in terms of the meeting objectives. There are seven levels of evidence for evaluation: time and resource input; effectiveness of techniques used; number and description of people involved; reactions of audience during meeting; change in knowledge, skills, attitudes, or aspirations; actual practice change following the meeting; and desired end results based on original objectives.

Follow-up

__ ● Follow-up should be planned prior to the meeting. Make certain any commitments made for materials, personal visits or subsequent meetings, or other reinforcement are actually done.

■ Issued in furtherance of Cooperative Extension Work Acts of May 8 and June 30, 1914 in cooperation with the United States Department of Agriculture. Gail L. Imig, Interim Director, Cooperative Extension, University of Missouri and Lincoln University, Columbia, Missouri 65211. ■ An equal opportunity institution.

TIP Sheet
Agendas

Agendas are guides that expedite group accomplishments by focusing the discussion and making wise use of time. An effective agenda maximizes pre-meeting preparation.

Before the Meeting

Gather information:

1. Review the minutes of the previous meeting for any unfinished business.

2. Seek input from members - new business, committee reports, or other items.

Prepare the agenda, including:

1. Name of group or meeting.

2. Purpose of the meeting (e.g., meeting, special meeting, planning meeting).

3. Date and place.

4. Starting and ending time.

5. Names of people who fill special roles (outside facilitator, observer, and resource person).

6. Agenda items. Since a group's attention span parallels a bell-shaped curve, place the easiest items at the beginning and ending of the meeting and the more difficult items around mid-meeting.

7. The time required for each agenda item. Assign a specific time, for example: 7:15-7:30 pm, rather than 15 minutes.

8. Persons responsible.

9. Background materials/special notes.

10. What to bring.

Mail the agenda and supplementary materials. They should arrive several days prior to the meeting.

During the Meeting

Agendas are effective only when followed. To make best use of agendas:

1. Start on time.
2. Accept additions or amendments to the agenda.
3. Invest "people" time by scheduling time for interaction, perhaps as much as 25 percent of the meeting. When interaction is healthy, the task seems to take care of itself.
4. Follow all reports with an action decision. What needs to be done?
5. Specify person(s) responsible for each action.

- Adapted from Doyle and Strauss (1976)
and Sharpe (1984)

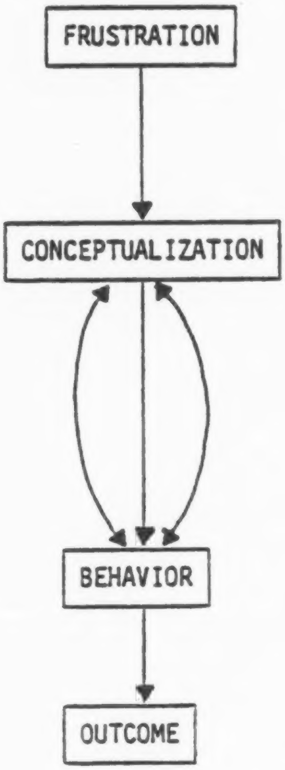
Conflict Management

UNDERSTANDING CONFLICT

Most authorities claim some conflict is inevitable in human relationships where people and groups are interdependent. Often clashes occur more over *perceived* differences than real ones...people anticipate blocks to achieving their goals that may or may not be there. Thus a conflict is:

> *Two or more people perceiving that what each one wants is incompatible with the other.*

There is a normal process of development in any conflict and this process tends to be cyclical, repeating itself over a series of episodes:[1]



FRUSTRATION: I am blocked from satisfying a goal or concern.

CONCEPTUALIZATION: I begin to determine in my mind what the problem is. I begin to attribute motives and blame based on my perceptions.

There is a cycle of reenforcement between these two. How I act is determined by what I believe about the other party. How I act determines how he perceives my motives and how he/she consequently acts.

BEHAVIOR: I act on the perceptions above.

OUTCOME: The resulting conflict becomes win/lose, lose/lose, or win/win depending on the behavior of both parties.

Prepared by Martha Snider, Family Resource Mgt., Oregon State University, 1982 (see reference).

This diagram illustrates how important it is to check out our perceptions and assumptions about the other party's attitudes and motives. Our subsequent behavior and outcome of the conflict is directly determined by the *conceptualization phase*.

We act on our beliefs about the other party. For example, I may have decided that the person has rejected my idea because he or she is threatened by me or does not like me when in fact, I did not communicate clearly or give them enough information. How differently I would respond depends on which of these I believed to be true.

Being aware of warning signs can minimize conflict situations. The following social relationship characteristics should alert our attention:

1. AMBIGUOUS JURISDICTIONS

   If boundaries of responsibility and authority are unclear, the possibility of conflict increases.

2. CONFLICT OF INTEREST

   Competition for perceived scarce resources (or rewards) escalates conflict possibilities.

3. COMMUNICATION BARRIERS

   Lack of communication, misunderstanding in terminology, unwillingness to listen to other party, etc. escalates conflict possibilities.

4. OVERDEPENDENCY OF ONE PARTY

   If one party depends too heavily on the other for resources or tasks, conflict is more apt to occur.

5. DIFFERENTIATION IN ORGANIZATION

   The greater the degree of differentiation in an organization (i.e., levels of authority, types, and numbers of specific tasks), the greater the potential for conflict.

6. ASSOCIATION OF THE PARTIES

   The more the parties interact both in decision making situations and informally, the more the opportunities for conflict increase. However, *major incidences of conflict decreases as participation increases*.

7. NEED FOR CONSENSUS

   When all parties must agree on the outcome, disagreements tend to escalate.

8. BEHAVIOR REGULATIONS

   Conflicts are greater when controls, i.e., rules, regulations, formal policies are imposed.

9. UNRESOLVED PRIOR CONFLICTS

   As the number of past unresolved conflicts increases, so does the possibility for more conflicts in the future. (This underlines the importance of managing conflicts at their earliest stages since they do not go away!)

When you consider that all groups are made up of *individuals* who each come to a situation with different experiences, knowledge, capabilities, and emotional characteristics, it is no wonder that there are conflicts. On the other hand, it should be remembered that these differences are also the ingredients of *innovation, creative problem solving*, and *organizational achievement*.

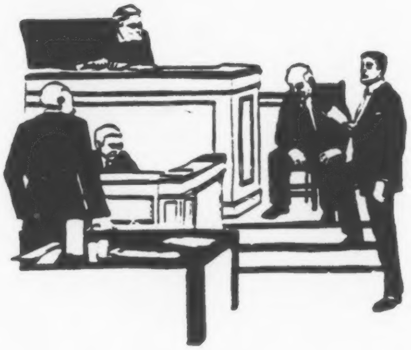
Often many of us shy away from or deny conflict because of the memories (conflict scares) of past conflicts that still hurt.

Probably the most lasting of those scares have been caused by conflicts with those who we are closest to: family, close friends, trusted colleagues and work groups and other "causes" that we cared most about.

COMMON MISCONCEPTIONS REGARDING CONFLICT

Frost and Wilmont suggest that one reason people still hold very negative opinions about "doing conflict" is because of the following *misconceptions* which seem to be perpetuated:[2]

1. *Harmony is normal and conflict is abnormal*. THIS IS UNTRUE. Conflict is very normal, in fact inevitable.
2. *Conflicts and disagreements are the same*. Conflicts are more serious and usually involve incompatible goals.
3. *Conflict is the result of "personality problems"*. Personalities do not conflict...people's behavior conflicts.
4. *Conflict and anger are closely merged in most people's minds*. Conflict involves issues as well as emotions and the issue and the participants determine the emotions generated. They may feel fear, excitement, sadness, frustration and other emotions as well as anger.



LEVELS OF CONFLICT

One of the things that determines the depth and complexity of conflict is the basic issue(s) at stake. Most experts identify four areas of disagreement which are involved in conflict situations. Each one gets more complex and thus more difficult to resolve:

LEVEL I - *Facts or Data:* The parties simply have different information. This is often a basic communication problem and, when all pertinent information is shared with those concerned, differences disappear.

LEVEL II - *Process or Methods:* The parties disagree over the best way to achieve a goal or solve a problem. This becomes somewhat more difficult, but by using sound problem-solving techniques it can usually be settled.

LEVEL III - *Goals or Purpose:* The parties cannot agree on what the group's basic purpose or mission is or what they would like it to be. Negotiating goals takes patience and skill, but it is vital if collaboration is ever to be attained.

LEVEL IV - *Values:* The parties disagree about the basic meanings of the situation and things they hold dear. They are, in fact, coming from very different and alien places. These conflicts are extremely difficult and can best be dealt with by an expert third party.

MANAGING CONFLICT WITHIN A GROUP

Conflict not managed within a group will bring about delays, disinterest, lack of action and may even cause a breakdown of the group. Unmanaged conflict may result in withdrawal of individuals and an unwillingness on their part to participate in other groups or assist with group action programs.

Frost and Wilmont, Interpersonal Conflict, 1978.

Resolving conflict situations often requires the assistance of a third party. Professionals and leaders in a group or organization may have to become the third party "arbitrator" in a conflict situation. This requires an understanding of the conflict situation, the conflict cycle, the reactions and adjustments that may occur in the resolution process and an ability to objectively pursue some sort of resolution.

The third party conflict manager must be an active listener, be aware of timing and use feedback techniques to check for accuracy of communication during all phases of conflict management.

Phases of Conflict Management

1. Collect data - know exactly what the conflict is about and analyze behavior of parties involved.
2. Probe, ask open-ended questions, actively listen...facilitate communication.
3. Save face - work toward a win/win resolution. Avoid embarrassing either party. Maintain an objective (not emotional) level.
4. Discover common interests - this will help individuals to redefine dimensions of the conflict and perhaps bring about a compromise.
5. Reenforce - give additional support to common ideas of both parties and know when to use data collected.
6. Negotiate - suggest partial solutions or compromises identified by both parties. Continue to emphasize common goals of both parties involved.
7. Adjustments solidified - review, summarize and confirm areas of agreement. Resolution involves compromise.

> *The third party conflict manager must seek to involve both parties in a collective solution to the conflict, because people are more likely to support what they help to create.*

Conflict cannot be avoided although the seriousness can be minimized by early conflict resolution.

Conflict can be a liability if unresolved. Negative outcomes are:

- people feel defeated and demeaned
- distance between people increases
- a climate of distrust develops
- cooperation may decrease
- resistance develops when team work is needed, and
- some people leave because of the turmoil.

However, there are positive outcomes also. Because of conflict often:

- better ideas are produced
- people are forced to search for new approaches
- long-standing problems surface and are dealt with
- people are forced to clarify their views
- tension stimulates interest and creativity, and
- people have a chance to test their capabilities.

Conflict like power is neither good nor bad. It is what we do with it that makes the differences.

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COMMUNITY GUIDE

MOTIVATION SERIES

How to Motivate People in Groups:

DOUGLAS DUNN
Community Development Specialist

HANDLE CONFLICT CREATIVELY

KEY 8
Parts A and B

How do you develop 'espirit de corps'? How do you handle conflict within a group? This is the ninth in a series of ten Community Guides on how to increase participation/motivation within volunteer groups. Specific techniques are provided to aid the reader in developing skills which will increase his or her effectiveness in groups.

Differences of opinion and conflict are common to any community group. Where people of different backgrounds and interests are brought together for community or group decision making, differences of opinion are to be expected.

Too often, however, inter-personal conflict is suppressed in favor of group harmony. This is dangerous. Suppressing conflict only drives it underground to reappear later in some more destructive form. Also, to discourage strong feelings and convictions kills the very vitality that the group so badly needs. Conflict can stimulate new thought, lead to more creative solutions, and keep a group alert to the various interests of its members. Conflict gets internal dissension and dissatisfaction out in the open where it can be used in making the group more responsive to its members.

Conflict, then, is best dealt with openly. As long as conflict is focused on the job to be done — rather than on personalities — the gains usually outweigh the costs. But skills are needed. If conflict is not handled creatively, it can be a very destructive force.

Well then, how can you effectively use conflict to revitalize a group rather than tear it apart? Part A discusses how different people view conflict and respond to it, Part B provides specific skills in personally handling conflict. Part C provides techniques for third party intervention in group conflict. And if everything else fails, Part D indicates how to defend yourself in a donnybrook.

IF NOT HANDLED CREATIVELY, CONFLICT CAN LEAD TO PERMANENT ALIENATION

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A. OUR ATTITUDES ON CONFLICT

Conflict is a daily reality. Our individual needs and values invariably come into opposition with those of others. As children we developed personal strategies for dealing with such conflict. They might have included competition, aggression, defensiveness, emotionalism, withdrawal, compromise or confrontation. Those strategies that worked for us as children often continue to be used in our adult relationships. Even though these childhood strategies may not be very effective in our adult relationships, we continue using them because we are familiar with them. In short, we lack an awareness of alternatives.

To give us greater insight into how each of us now responds to conflict, researcher Jay Hall outlines five personal "styles" to resolving conflict in groups. WHICH BEST DESCRIBES YOU AND OTHER MEMBERS OF YOUR GROUP?

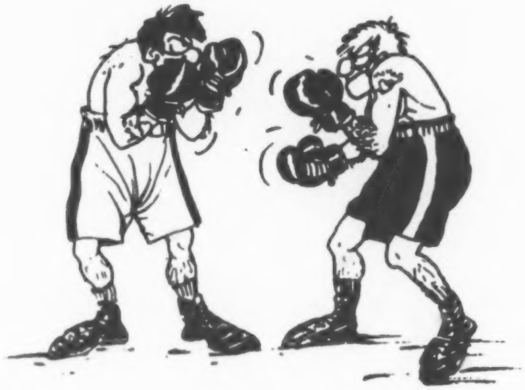
1. The TOUGH BATTLER seeks his own goals at all costs. He has no doubt in his mind that he is "right," and he demonstrates that by using facts that support his postition. He views conflict as a nuisance which occurs only because others do not see the correctness of his position. He is suspicious of others, and is quite willing to sacrifice them if they refuse to go along with his desires.

2. The FRIENDLY HELPER overvalues the importance of his relationship with the group, and undervalues his own personal goals. He feels that conflict grows out of negative self-centeredness, only leads to hurt feelings and anger, and thus should be avoided at all costs. He works hard to maintain group harmony and to avoid disagreement. He readily compromises his own feelings and is hesitant to speak out. He avoids controversial subjects.

3. The JELLY FISH simply removes himself, either mentally or physically, from the conflict. He sees conflict as a hopeless, useless and punishing experience.

4. The COMPROMISER actively seeks to find some middle ground, using voting and rules to avoid confrontation. He strives to develop a "workable" solution, rather than the "best" solution.

5. The PROBLEM SOLVER actively seeks to satisfy his own goals as well as the goals of others. He sees conflict as natural and helpful. He insists on getting disagreements out in the open, so that they can be worked out. He trusts others, empathizes with their feelings, and shares all information. He recognizes that when conflict is resolved to the satisfaction of all, that greater commitment to the solution is likely.



B. HOW TO RESOLVE CONFLICT BETWEEN YOURSELF AND OTHERS

When you find yourself in conflict with someone, how should you respond? How can differences be resolved without becoming destructive?

The following is intended as a guide in aiding you to respond CREATIVELY to conflict. Since the appropriate response will depend on the particular circumstances, a series of approaches is provided. To effectively resolve a conflict between yourself and someone else, proceed through the following steps — starting with approach #1 — until one of the approaches works. Each succeeding approach is more forceful and carries higher risks. Adherence to these steps insures that you will be no more confrontive, and potentially disruptive, than the situation requires.

1. LISTEN
The first step in responding to differences of opinion is to listen. Step back from the conflict a moment and listen objectively — both to the other person AND to yourself. Tune in to what the other person is saying. What are the points he is trying to make? Tune in to his feelings. Put yourself in his shoes.

Tune in to your own feelings. Think over your beef. Are you making a mountain out of a mole hill? Is it really worth getting into a hassle over? IF IT ISN'T, go on to approach #2. IF IT IS, go on to approach #3.

2. LET IT PASS

It takes two to tango. The easiest way to avoid a conflict is by not entering into it. Concede to the differing point of view, or let the situation pass without comment. THEN FORGET IT; let it pass like water off a duck's back.

If someone in an emotional state makes a personal jab at you, assume he didn't mean it and let it pass. Don't lower yourself into mud slinging. Any reaction to mud slinging reinforces it. No action is usually the best action. Let it pass without comment, and FORGET IT. If you carry a grudge you've defeated this approach.

If, however, you find the matter is more important to you than you first thought, or you are emotionally unable to "let it pass" without resentment and forget it, then go to approach #3.

3. REFLECT

Tune in to what the other person is saying, and then check it out with him to make sure you indeed understood him correctly. State your understanding of what the other person said — to his satisfaction — before you present your view. ie. "What I heard you say was ... Did I understand you correctly?" Then ask the other person to state his understanding of what you said before he moves on to another point. This should nip in the bud any midunderstanding. Frequently, differences of opinion are "perceived" rather than real.

Don't hastily assume that you understand the other person's point of view. Research shows that 85% of all conflict is the result of miscommunication. Yes, you're talking with each other, but are you communicating? DON'T PROCEED BEYOND APPROACH #3 UNTIL YOU HAVE FIRST USED THE PRESCRIBED "REFLECTING TECHNIQUE". Improved communication will resolve most conflict. If, however, emotions are blocking the way, proceed to approach #4.

4. VENT EMOTIONS

Tune in to the other person's feelings, ie. "You seem upset, what's the matter?" Then listen. Sympathize. At this point, don't try to reason with him. Instead encourage him to get everything off his chest. Empathize with his emotions, ie. "I can appreciate your feelings." Only after the emotions of the situation have been fully expressed and acknowledged, and the person put at ease, can a rational discussion continue.

If the conflict has not been resolved through reflection and venting, then go to approach #5.

VIOLENCE
DEMAND

5. COMPROMISE

In many cases, improved communication and a venting of emotions will not change the reality of the conflict. Then, try compromise — ie. "I can understand your feelings. I will ... if you will ..." Through such contracting, each gives up something in return for the other's support. Both parties "win," and a "win/lose" battle is avoided. Compromise recognizes that conflict is not all one sided.

Another form of compromise is mutually agreeing to give a particular solution/proposal a trial run. With such a compromise, it is essential, however, that agreement is reached before you start as to how the trial will be evaluated.

If a compromise is not possible, try confrontation. Go to approach #6.

6. GENTLY CONFRONT, WITH FACTS

If the above approaches have not worked, confront the person head on with the realities of the situation, as you see them. But don't be judgemental. USE FACTS, ie. "During the past six months membership has dropped 60%; a change is needed." If the person tries to argue with you, calmly repeat the facts and what you want. Don't let him play on your emotions. This approach shows persistence, but avoids arguments and the exchange of angry feelings.

If, however, you find yourself angry and upset, unable to let your emotions pass without resentment, use approach #7. Bottling up your feelings can only lead to ulcers. Get them out in the open.

WARNING: Use direct confrontation only if everything else fails. People respond better to reward than to attack.

7. DIRECTLY CONFRONT, WITH FEELINGS

Let people know how you feel. They may not be aware that their actions are disturbing you. Openly discuss what's bothering you. Encourage the other person to react to your feelings. Then consider whether your behavior was appropriate or whether you over reacted.

CONFRONT, DON'T ATTACK. Take full responsibility for your feelings and action:

(a) Express your feelings through non-threatening "I" statments (ie. "I got angry when..."; "I'm disappointed that..."; "I was hurt by...") rather than judgmental "you" statements (ie. "YOU caused me to..."; "YOU are a loud mouth," etc.).

(b) Confine your statements to describing what a person has actually DONE or SAID (ie. "I didn't like it when you cut me short") rather than judging what he is or is trying to do. (ie. "You're uncooperative" or "You are avoiding the issue"). Don't label things as good/bad, right/wrong, or should/shouldn't.

(c) Describe specific behavior and incidents that are bothering you (ie. "When I tried to talk with you, you interrupted me and did not seem to be interested in what I was saying"). Don't characterize or make generalizations. If a person's actions, tone or body language consistently contradicts his words, confront him about it. He may not be aware of it. "You say you're sorry, but you honestly don't sound that way."

The purpose of direct confrontation is to get your feelings/emotions/anger out in the open where they can be dealt with constructively, without tearing the other person down. Don't confuse confrontation with verbal attack.

8. PRODUCTIVELY ARGUE

If nothing else works, get the underlying conflict out in the open and thrash it out. But fight fair and preserve the relationship. The following points should be helpful:

(a) Avoid disrupting the group; if appropriate, agree to postpone your discussion/argument to another specified time.

(b) Clearly decide what you want the other person to do or agree to, so you don't carry the argument on unnecessarily.

(c) When you argue, try to find a solution both of you can live with, instead of just pushing your view through to win.

(d) Keep the argument to the here and now — don't drag in ancient grievances.

(e) Don't try to analyze the other's motives — stick to the issue at hand and avoid personal attacks.

(f) Use the communication skills described in Key #5.

(g) Try to make the argument a joint project for discovering reality. Don't try to overwhelm.

Follow the above rules, and argument can be productive. But argument is a very tiring, emotional and high risk approach to dealing with conflict. It should only be used as a last resort.

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COMMUNITY GUIDE

MOTIVATION SERIES

How to Motivate People in Groups:

DOUGLAS DUNN

Community Development Specialist

HANDLE CONFLICT CREATIVELY

KEY 8
Parts C and D

This Community Guide is a continuation of Key #8 on how to handle conflict within volunteer groups.

C. HOW TO EFFECTIVELY INTERVENE IN GROUP CONFLICT

Differences of opinion and resulting conflict are a natural part of group decision-making. How well differences are resolved depends greatly on the skills which the group possesses in mediating conflict. Conflict can easily get out of hand if left to chance. Many groups lack skills in managing conflict, and they are suffering because of it. What can you as a third party do to insure that conflict is resolved creatively?

1. Control the PROCESS by which decisions are made, but not the CONTENT of those decisions. The role of mediator is similar to that of a "traffic cop." Your responsibility is to direct traffic, not to promote a given solution. The mediator suggests different approaches to resolving the conflict, insures open and balanced conversation, and protects the individuals involved from personal attack. The establishment and strict enforcement of appropriate ground rules are essential.

2. Be an active, supportive listener — and SHOW IT. (Review Key #6) Accept the views and feelings of each individual as legitimate. Don't judge. Empathize.

THE MEDIATOR

Get things out in the open by listing on newsprint or a blackboard the points made by each side. Record viewpoints without reference to who made them.

Use feed back to check for accuracy of communications. "You said ... Did I hear you right?" Focus the conflict on facts rather than hearsay and speculation. Combat deception and misinformation by raising questions, ie. "Are you sure?" If the response is weak, defer that particular issue until the information can be obtained.

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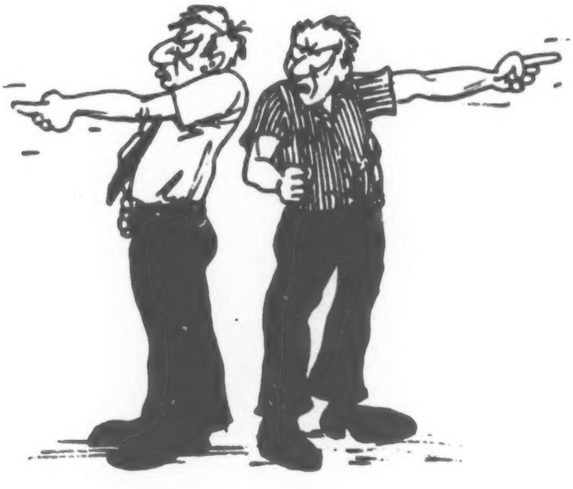
CALL A TIME OUT

3. If the discussion gets heated, call for a time out. Inititate the following rule: A person can speak only after he or she has first accurately restated the ideas and feelings of the previous speaker. "I heard you say ... Is that correct?" Have the parties communicate directly to each other rather than through you.

4. Combat "solution-mindedness" (the tendancy of people to propose solutions before agreement has been reached as to the problem). FOCUS ATTENTION ON PROBLEMS TO BE SOLVED rather than on proposals, recommendations or solutions to be approved. Start out by asking each party to define specifically what they wish to accomplish with their proposed solutions. Continue your questioning until a problem, goal or obstacle is defined. Probe. Get everything out in the open. Only after the "real" problem has been clearly defined can a cooperative search for solutions begin.



THIS IS THE WAY

5. Seek to expand possible alternatives. Encourage both parties to search for other acceptable solutions. Focus attention on defeating the problem rather than each other.

Set aside a period of time for brainstorming. Get both parties to agree that during the brainstorming no discussion or evaluation of the alternatives suggested by each will be permitted. Then enforce the rule. People will be more willing to suggest new approaches if they are protected against ridicule and criticism. Then evaluate the alternative solutions in terms of both quality and acceptability.

WHAT ELSE MIGHT WORK?

6. Adhere to the "Problem-Solving Process" and take adequate time for each step: (a) Clearly define the problem from eveyone's viewpoint. (b) Define the conditions or criteria which a solution must meet to be satisfactory to all involved. (c) Search for alternative solutions. (d) Evaluate the alternatives.

7. Actively seek compromise, and then reinforce it. Discover common interests and build on them. Seek a solution that both parties would be willing to give a trial run. Stress that there is no single "right" or "wrong" solution. Make your suggestions in the form of questions, ie. "What about ...?" or "Have you considered ...?"

8. Insist on consensus. Use majority rule only as a last resort. Consensus is finding a solution that is ACCEPTABLE to all, but which is NOT necessarily everyone's first choice.

9. When appropriate, freeze the discussion long enough to focus attention on the general behavior of the group. Serve as a mirror in heightening the group's awareness of their own behavior and the possible consequences of such behavior. Suggest alternative behaviors, ie. how to express view points without being critical and judgmental (see Key #5). But don't single out individuals. If an individual continues with disruptive, annoying behavior, wait for a break, then take the person aside and share your perceptions with him in an open, frank but caring manner.

10. Do not belittle the conflict. It is very real to the persons involved.

D. HOW TO SALVAGE A DONNYBROOK

What if "all hell has broken loose?" People are threatening each other and name calling. Sides have been drawn. Resentment and hard feelings are high. People are no longer listening to each other. And you are under personal attack. What do you do?

First, pause 30 seconds. Take stock of yourself. Take several deep breaths. If you can, put your hand over your eyes and clear your mind. Ignore for a couple of minutes the commotion around you. Calm down. Get in control of yourself. Now, proceed using the following techniques:

1. State what you want, see and feel — using positive "I" statements, "I want ...", "I think we should ...", "I was upset by ...". Don't bring in personalities or make accusing, "YOU" statements. Don't scold or lecture others on what they "should" do. TAKE FULL RESPONSIBILITY FOR YOUR COMMENTS.

2. Be persistent. If individuals continue to hassle you, say what you want over again — and again if necessary — without getting angry, irritated or loud. Clearly explain your position, if there are questions. But don't allow yourself to be sidetracked into justifying your feelings or rationalizing your behavior. Don't get sucked into a game of one-upsmanship as to who is "right" and "wrong." Stick to the issue.

3. Recognize the right of other people to express their views. SHOW THAT YOU ARE LISTENING. Take time to feedback your understanding of what your opponent has said before you present your views, ie. "I heard you say ... Did I understand you correctly?" Reflective listening is very effective in quenching a donnybrook.

4. Stand up for your own right to express your views without harrassment or interruption. "I allowed you to express your views and I've taken note of them, I now ask that I be allowed to express my views — with similar respect."

5. When personal accusations are made against you, RESIST THE NATURAL INSTINCT TO DENY CHARGES AND DEFEND YOURSELF. When criticized, pause a minute, collect yourself, thank the attacker for his criticism and then turn the issue back to the attacker for positive suggestions, ie. "Thanks for bringing that to my attention. What do you think should be done?" If you've made an error, admit it openly. Don't make excuses.

If individuals persist in attacking you personally, stop and in an open, low-key manner, openly solicit their criticism and accusations. This will get the critical issues out in the open if they are intended as constructive, or it will exhaust them if they are intended as disruptive or manipulative. Sympathize with the criticisms, without making apologies or excuses, ie. "That is irritating, and I can see why you are upset with me." This technique can quickly break the complaint, denial, excuse, counter-accusation cycle that dominates most donnybrooks.

6. Get away from personalities. Don't refer to ideas and views as "yours" or "mine." Direct your comments to the ideas presented rather than the people voicing them.

7. Avoid "why?" questions. Don't require opponents to justify their personal feelings and preferences. Personal feelings are rarely changed through intellectual argument or persuasion. Don't waste time trying to psych out people's underlying motives.

8. Be specific about what is bothering you. Stick to one issue at a time. Be concrete. Stick to observable facts and don't bring up past grievances.

9. SEEK A WORKABLE COMPROMISE, "I will ... if you will ...".

10. If the discussion gets particularly heated, call for a time out. Keep cool. Don't allow your opponents to play on your emotions.

11. Seek help. Propose to the group that a neutral outside person — acceptable to all parties — be asked to serve as moderator.

12. Finally, concentrate on what YOU can do to remedy the conflict rather than on what others "ought" to do. DO MORE THAN JUST REACT. Be willing to walk the extra mile.

• • •

CONCLUSION: By now you may be saying to yourself: "I can't possibly remember to do all these things." or "This is good theory, but when people get into an argument, they're not going to listen to someone tell them how to resolve conflict." or "I've tried to use these principles, but it's hard. I remember afterwards what I should have done. For me it's hopeless."

When you find yourself emotionally involved in a conflict, IT IS HARD to keep these principles in mind and use them. There is a big difference between understanding how to handle conflict and actually doing it. Managing conflict requires taking control of your ego, rather than letting your ego control you. MOST OF ALL, IT TAKES PRACTICE. You don't get better at doing something unless you practice. Even the world's best athletes and performers spend most of their time practicing. The choice is yours. Either you can sit back and complain or you can do something about it.

Yes, do take this Guide to your meetings. Do stand up and call for a time out when conflicts arise. Do suggest that the argument be postponed for 5 minutes while you read, and reread, the appropriate techniques. You may at first feel silly and unsure of yourself. But the group is going to thank you afterwards for intervening.

Finally, you can't force anyone else to do anything — you can only change your own behavior. IT'S UP TO YOU.

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PEOPLE ENVIRONMENT SERVICES ECONOMY

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COMMUNITY ISSUES WORKSHEET

ISSUE OR PROBLEM ______________________________

Critical Parts of Problems	Who	When	Where	Information	How	Who is Responsible	Strategy	Resource

Are You Involved?

Action List

Check those things you have done in the last year. Place an asterisk (*) by the things you will do in the next year.

__ 1. Currently registered to vote

__ 2. Attended political meetings

__ 3. Telephoned, wrote or visited public official on an issue

__ 4. Telephoned to persuade others to act on an issue

__ 5. Wrote a letter to editor of press, TV or radio on an issue

__ 6. Scheduled an office visit to my legislator on an issue

__ 7. Joined or formed a group to work on an issue

__ 8. Contributed money in support of an issue or candidate

__ 9. Canvassed door to door in support of an issue or candidate

__10. Attended hearings on an issue

__11. Testified at hearings on an issue

__12. Volunteered for appointment to commission or to ad hoc group studying issue

Other things I have done:

Adapted from Family Community Leadership project,
New Mexico State University

LEADERSHIP ENHANCEMENT FOR THE ACTIVE RETIRED

One Vote Does Count!

1. One vote saved President Andrew Johnson from impeachment in 1868.

2. In 1875 one vote changed France from a Monarchy to a Republic.

3. One vote elected Rutherford B. Hayes to the Presidency in 1876.

4. One vote saved the Selective Service System - known as the draft - only 16 weeks before Pearl Harbor in 1941.

5. In 1948, Lyndon Johnson won his first election to the United States Senate by only 87 votes. His opponent Coke Stevenson, former Governor of Texas, received 494,104 votes, and Johnson received 494,191 earning the name "Landslide Lyndon."

6. In the 1960 Presidential election, John F. Kennedy's national plurality was less than one vote per precinct. He defeated Vice President Nixon by less than 120,000 votes out of almost 69 million votes cast.

7. In 1962, the Governor of Minnesota, after 3 months of recounting and certifying ballots, was elected by the hairline margin of 91 votes.

8. In the New Hampshire 1974 Senatorial election, only 2 votes separated the winner and loser. For the first time in U.S. history, a special election was ordered to select a U.S. Senator, and J.A. Durkin won over Louis B. Wyman.

9. In the 1981 election for Governor of New Jersey, Thomas Kean was declared the winner over James Floria by only 1,677 votes out of over 2.3 million votes cast. This was after a recount which added about 200 votes to the winner's margin.

Source: Family Community Leadership Project, New Mexico State University

PUBLIC POLICY QUIZ

Some of the following statements are true, some are false and some are value judgments. Check ( ) the value judgments.

____ 1. If the people had all the facts about any particular problem and really understood them, their decision in regard to what ought to be done to solve it would be almost unanimous.

____ 2. Taverns should be permitted to operate on Sunday.

____ 3. We need educational programs to keep more young people in the rural area.

____ 4. Women should be paid the same salary as men.

____ 5. The national debt is already at the danger point and should under no circumstances be increased.

____ 6. Prices should be set by the free forces of supply and demand in an unregulated market.

____ 7. Taxes are now too high and should be reduced.

____ 8. As the percentage of the population engaged in farming declines, a nation's material standard of living increases.

____ 9. The government has already intervened in too many spheres and certainly should curtail rather than expand its activities.

____ 10. Anyone that has his/her own selfish interests at heart should not do educational work in controversial areas, e.g., school consolidation, at what levels farm prices should be supported, proper eating habits, etc.

____ 11. Interest rates are too high.

____ 12. Public policy educators should be on *tap*, not on *top*.

____ 13. Reaganomics worked.

Public Policy Quiz (continued)

____ 14. The defense budget will produce overkill and, therefore, can be cut.

____ 15. If interest rates are to come down without a return to inflation, the federal deficit must be cut.

____ 16. It is none of the government's business what you and I eat.

____ 17. If one has a history of cholesterol problems, scientific investigations have shown that one must monitor and control cholesterol intake.

____ 18. What is advantageous to one individual may be disadvantageous to another.

____ 19. The power structure is continually in a state of flux.

____ 20. The status quo is rarely preserved over the long run.

____ 21. We have become a government of special interests.

____ 22. Public issues are usually debated in terms of the symptoms rather than the actual problem.

____ 23. We are depleting our ground water supply; therefore, we must find another way to ration it.

____ 24. Because of the influence of the cattle industry, it is impossible to do a public policy education program on nutrition in beef-producing states.

____ 25. The stress on the family involves traditional values and; therefore, cannot be handled in a public policy framework.

____ 26. A sales tax is regressive, which means it places a greater burden on low income people.

____ 27. Research shows that cigarettes are harmful to one's health; therefore, they should be outlawed.

____ 28. Since the property owner carries more than his/her fair share of local taxes, a local earnings tax should be imposed.

Public Policy Quiz (continued)

____ 29. Marijuana smoking leads to harder drugs.

____ 30. Since local people have a better understanding of local problems than federal bureaucrats in Washington, revenue should be returned to local units of government with no strings attached.

____ 31. If people are willing and able to work but can't find a job, they have a right to receive welfare payments.

____ 32. Future spending cuts should come from the defense budget rather than Social Security.

____ 33. The current rate of unemployment is too high.

____ 34. Day care centers are needed by working mothers and, therefore, should be publicly funded.

____ 35. The spread of AIDS is easily controlled.

Adapted from B.L. Flinchbaugh, Extension State Specialist, Kansas State University, 1987

RULES OF THUMB ON HOW TO WORK WITH DECISION-MAKERS

In working with decision-makers, there are three important things to consider: 1) you are an educator and must maintain your role as such; 2) you must understand the political process; and 3) there are certain rules that apply to working with people in general that must be considered in working with anyone - including decision-makers.

Your Role as an Educator

1. Remember that you are an educator, not a local politician.
2. Provide facts, alternatives and consequences, not solutions to public problems based on your personal value judgments.
3. Be an objective analyst, a reliable source of correct information.
4. Keep your ears open and your mouth shut when working with decision-makers and political leaders involving public issues.
5. Study who makes decisions in your community by asking questions and attending coffee klatches at the local cafe. Visit beauty parlors, barber shops, and sale barns.
6. Don't "play ball". Do no special favors. You only have one chance to lose your integrity. Make sure that it remains intact. You will be respected for it.
7. Be on *tap*, not on *top*. Facilitate the decision-making process.

Dealing with Politicians and the Political Process

1. Do not become identified with one political party.
2. Do not take sides on local controversial issues.
3. You must understand the political process. Accept it as is. Don't try to change or reform it - you can get caught.
4. Don't become buddies with any faction or group.
5. Invite decision-makers and local politicians to your meetings. Introduce them and thank them consistently, not just at budget time!
6. Make an effort to learn the likes and dislikes of decision-makers and their staff.
7. In written and oral communication, be brief, organized, factual, and to the point. Decision-makers are busy people! Five minutes and one page is all you can expect.
8. During campaigns, provide information to all who request it. Do not support any one candidate.

Your Personal Traits in Dealing with Decision-Makers and Politicians as Well as Others

1. Participate in local events. Be civic minded. Do your part. It will be noticed.
2. Be complimentary.
3. Be forthright and firm, but not self-righteous. Carefully evaluate your relationships with people so that you do not allow yourself to be used. Be courteous but firm when you "draw the line".
4. Don't participate in community gossip.
5. Be critical only as a last resort and then only in private, one on one.

Adapted from B.L. Flinchbaugh, Extension State Specialist, Kansas State University, 1987

Speak Up!

Writing to Policymakers

Eunice Lieurance
State Family Economics and Management Specialist

A problem becomes a public issue when it has an impact on many people. The affected people usually have different opinions on how to solve the problem. The solution to such a problem is public policy. To develop the policy, the officials need to know the opinions of many people.

Writing a letter to policymakers is an easy, effective way to let your opinion be known. Typing skills aren't necessary; a readable handwritten letter is fine. A personal letter expressing your opinion carries more weight than your signature on a form letter.

Before you write

Gather as much information about the issue as possible before putting your opinion in writing. Where will the resolution to an issue be decided? Will it be at the local, state or national level? Will the decision be made by elected officials or agency people? When will the decision be made—in a month? two months? The sooner you make your feelings known, the better. Refer to Home Economics guide sheet GH 3970 for specific ways to gather information. Guide sheets GH 3971 and GH 3972 provide other information about getting involved in public policy decisions.

After gathering together all available information, define the problem. What are the issues? Consider all the alternatives you can think of to resolve the problem. Who is affected by each alternative? How will they be affected?

Next, think about the facts. How do you feel about the issue? Your opinions will be based on the facts you have gathered and your values.

Guidelines for writing

1. Write on only one subject at a time.
2. Outline and write down your thoughts in an organized manner. Carefully read what you have written. Are your thoughts clear and to the point? Are they as brief as possible? Try to keep your letter to one typewritten page. A

half-page may even be better.

3. Begin your letter by telling who you are and why you are concerned. If you are writing for a group, tell who they are and how many there are. Be sure your name and address are clearly included in the body of the letter. Envelopes are thrown away.
4. Tell briefly what action you think officials should take and why. If you are writing about technical information, tell what knowledge you have that makes your opinion valid.
5. If you are writing to several people about the same issue, do not send copies of one letter. Make each letter a little different.
6. If you are writing about a particular bill give the name and number of the bill. U.S. House bills are HR ####; U.S. Senate, S ####; State House, HB ####; and State Senate, SB ####. If you don't know the name and number, give enough information about the content so the person knows what you are writing about.
7. Be courteous in your writing. Never make threats.
8. Pay attention to when you send your letter. Try to send your letter while the issue is being discussed by the decision-making group. If you feel strongly about an issue, you might consider sending a letter early in the discussion and another just before a decision is made.
9. End your letter with a thank you, and express your interest in future action. You may also ask the person to whom you are writing what their opinion is about the issue and the basis for that position.
10. Write a thank you if the person to whom you wrote your letter does something of which you approve. Decision-makers are delighted by expressions of thanks.

If the policymakers decide against you, don't be discouraged. Continue to write letters based on facts you have gathered telling officials how you feel and why. Decision-makers want to hear from you.

Sample letter

Your Address
Date

Name
Salutation
Introduction
Identify yourself.
Give brief reference to your occupation, business or organization.
Purpose of Letter
Tell why you are writing.
Refer to the bill by name and number, if appropriate.
Give facts and/or figures to support your position.
Closing
Request a reply indicating his/her position regarding the issue.
Thank the legislator for his/her consideration of your position.

Complimentary Close
Your Name

On the following pages are samples of appropriate formats to use when writing local, state or federal officials.

Local Officials

Mayor

The Honorable (*full name*)
City or Town Hall
City, State, Zip

Dear Mayor (*last name*):

Sincerely yours,

Your name

Councilman

Councilman (*full name*)
City or Town Hall
City, State, Zip

Dear Mr. (*last name*):

Sincerely yours,

Your Name

Councilor, if a woman

Councilor (*full name*)
City or Town Hall
City, State, Zip

Dear Mrs./Ms. (*last name*):

Sincerely yours,

Your Name

State Officials

Governor

The Honorable (*full name*)
Governor, State of Missouri
Room 216 State Capitol
Jefferson City, MO 65101

Dear Governor (*last name*)

Respectfully yours,

Your Name

State Senator

Senator (*full name*)
State Capitol
Jefferson City, MO 65101

Dear Senator (*last name*)

Sincerely yours,

Your Name

State Representative

Representative (*full name*)
State Capitol
Jefferson City, MO 65101

Dear Representative (*last name*):

Sincerely yours,

Your Name

Federal Officials

The President

The President of the
United States
The White House
Washington, D.C. 20500

Dear President (*last name*):

Respectfully yours,

Your Name

U.S. Senator*

Senator (*full name*)
____ Senate Office
Building*
Washington, D.C. 20510

Dear Senator (*last name*):

Sincerely,

Your Name

U.S. Representative

Representative (*full name*)
House Office Building
Washington, D.C. 20515

Dear Congressman/Congresswoman (*last name*):

Sincerely yours,

Your Name

* *Senator John Danforth's office is Room 460, Russell Senate Office Building, Washington, D.C. 20510, 202-224-6154. Senator Christopher Bond's office is 417 Hart Senate Office Building, Washington, D.C. 20510, 202-224-5721.*

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GH 3973 File: Family Economics and Management

156-A302

Speak Up!

A Personal Plan for Involvement in Public Policy

Eunice Lieurance
State Family Economics and Management Specialist

Public policies can influence peoples' lives either directly or indirectly. Individuals, families, industry, agriculture, management, consumers, producers, taxpayers or a combination of these may all feel the results of public policy decisions. The effects on society may be social, economic or environmental. Different persons and different groups may be affected in different ways.

Whether you are a public policy advocate or educator, you need to understand 1) the problems (issues), 2) the alternative solutions, and 3) the consequences of each alternative to the affected groups.

Be as objective as possible. If you are an advocate, objectivity will help you clarify your own thinking and better prepare yourself to rationally discuss the issue with people with opposing views. If you are an educator, it is essential for you to present the information as objectively as you possibly can. This enables the decision-makers to make up their own minds without pressure from the educator. Such pressure is frequently resented and becomes counterproductive. Do your homework.

This guide helps you prepare your personal plan for getting involved. It also provides guidelines for working with others. For more information about participating in public policy, read Home Economics guide sheets GH 3970, GH 3972 and GH 3973.

Plan of action

To get involved in a particular issue, you need to develop a personal action plan:

- Decide if you are going to be an educator or advocator.
- Determine whether you will act as an individual or as a member of a group.
- If you represent a group, determine the best way to keep members regularly informed of the current status of the issue.
- Attend meetings of local, state or federal officials as well as public hearings.

If you are an advocate:

- Communicate your position on the issue to the individuals or groups that are involved. The type of issue will help determine whom to contact and which method of communication to use. Inform the media of your position, if appropriate.
- Identify and encourage other groups to support your position.
- If your issue is state, regional or national in scope, consider action at the local level that would reinforce your position.
- Don't give up even if your opinion does not prevail. The issue may come up again or you can turn your energy to other issues of importance to you. Remember, you can't win them all.

Networking

You can increase your effectiveness by using a technique called networking. Networking is a method of giving and getting information and support. It links people you know with people others know. Using this technique can save time and provide information and support for you. When you know of someone who has a skill or information you can use, don't be afraid to ask her/him for help; often all it takes is a phone call. To make networking work, you must also be willing to help others.

You may also use a network to provide support for an issue. One person calls several other people who then call several more. The purpose of the phone calls may be to share information or to alert each person called that the time is right for input. Of course, this will only work if each person in the network has done his/her homework and knows what his/her position is and how to express it. This method of making input is often referred to as a **telephone tree.** More information on the telephone tree may be found in Home Economics Guide GH 3972, "Speak Up: Be Sure the Policymakers Hear You."

To expand your own network, first identify your current network. Consider 1) people—family, friends and fellow workers, 2) organizations to which you belong, and 3) activities in which you participate. Next, consider the time, energy and money you have to spend on developing your network. Networking may be a good investment of your resources or it may take all of your time or money and leave you nothing to devote to the issues.

Successful networkers have these suggestions:

- Have a business card or other identification to leave with others.
- Keep your own written list of names, addresses and phone numbers.
- Identify key people who have access to information or people you need to know. These people may be staff and administrative aides, the county clerk, or volunteers active in the political process.

Making a presentation

No matter how you become involved in public decisions, at some time you will probably need to make a presentation to others. This may be a small or large group. It may be a brief presentation or a complete analysis of the issue. You may make a presentation by yourself or as a member of a panel. Whatever the situation, the organization of a presentation is the same in almost all circumstances.

Whether your purpose is to present information for people to make up their own minds, or to persuade them to agree with the alternative you think is best, guidelines for making a presentation are the same:

- Write down what you want to say. It is easier to organize your thoughts on paper ahead of time, than in your mind in front of an audience. Use either outline form or write out the complete text, but don't read your presentation word for word.
- Rehearse your entire presentation aloud.
- Practice in front of a mirror.

The basic organization is simple: 1) an introduction or opening; 2) the main body; and 3) the summary or conclusion.

The introduction

The two most important things to do in an introduction are to get the attention of the audience and tell your audience why you are there.

Be enthusiastic. Tell people who you are. State concisely the issue you are going to discuss. You might use an illustration of how things are to point out why the situation has become an issue.

The main body

State the facts, and be as objective as possible. This means doing your homework - remember that knowledge is powerful.

Support your information with illustrations. Use examples that relate to the needs and interests of your audience.

Recognize and address any myths you have heard if appropriate. Be able to explain why it is a myth. Remember that many people believe each myth to be fact or else the myth would not exist.

Don't spend too much time on one point. Keep your speech moving along.

Repeat points you want to emphasize. Say what you have said, but use different words.

Conclusion

End your presentation on a positive note.

Briefly restate your main ideas.

End by saying exactly what you want done. You may want members of your audience to reach their own conclusion about an issue. You may want them to write or phone their representative. Whatever it is you want them to do, tell them exactly what it is; don't leave them guessing.

Many presentations end with a question and answer session. If you don't know the answer to a question, don't be afraid to say so. If the question is important, you might want to follow up after you have had time to find the answer. If you are confronted with a hostile question, stay calm. Answer briefly and move on. A sense of humor will frequently defuse a potentially hostile situation. Terminate the question and answer session after a reasonable amount of time. Try to conclude by emphasizing your most important points quickly.

Thank the audience for their time and attention.

Working with people

Involvement in public issues means involvement with other people. Whether you are working with your best friend, volunteers, legislators, secretaries, or others, the rules of respect and courtesy apply. The following guidelines will be helpful in keeping a good relationship with others:

Don't underestimate people: With rare exceptions, people are honest, intelligent and want to do the right thing.

Be understanding. Put yourself in the other person's place.

Be friendly and thoughtful. Commend the good things others do. Thank them for what they have done for you.

Be reasonable and realistic. Recognize there are differences of opinion. Others have legitimate reasons for seeing things differently than you do. Someone may disagree with you on one point, but agree with you on the basic issue. Controversial issues frequently result in a compromise. That is a characteristic of a democracy.

Don't be a busybody. No one likes to be scolded, pestered or preached to.

Be open and candid. State your views and the reasons for your position. Don't leave anyone out on a limb by changing your mind after they have publicly agreed to support your position.

Be a good opponent. Fight issues—not personalities. Be prepared with alternative solutions to the issue. Don't engage in gossip about anyone.

Never break a promise. If you say you'll do something, do it.

Organization, planning and preparation are essential to effective involvement in public policy.

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Speak Up!

Get Involved in Public Policy

Eunice Lieurance
State Family Economics and Management Specialist

In our complex world, many individuals and families feel they are victims of government action. It often seems the government sets policies without taking into consideration the public's opinion.

You can keep this from happening. Your voice is important to those who make policies. The policymakers, whether local, state or federal officials, elected or appointed, are interested in your opinion.

A public policy is a set of principles that directs government actions. The policy may take one of many forms - laws, rules, programs, money, court decisions and even customs and traditions. These policies affect everyone, but not always in the same way. For example a policy that's good for the consumer, may not be good for the farmer.

Public policy is developed through a process of debate and compromise. For that process to work effectively, policymakers need to hear from a broad range of people. They need to know how a policy, or changes in a policy, will effect different groups of people, and how each group feels about the change. It's not always easy for our policymakers to find out all the different opinions; it is the responsibility of citizens to be involved. Your involvement in public policy can take any one of three roles:

1. Impartial observer - choosing to do nothing. In this role you must accept what others have decided. The risk is that other's decisions may not be what you want.

2. Public policy educator. In this role you first define the problem. Next you identify all the possible alternatives. Finally, you list the consequences* under each alternative. This information is then presented to the people with whom you are working. They then make their own decisions.

*Listing consequences instead of pros and cons, makes you more objective. It's difficult to list pros and cons without letting your own values influence your decisions. When personal values influence decisions, these decisions become subjective. An educator should be as objective as possible.

3. Advocate. In this role you study the issues and take a stand. You try to convince the decision-makers to make your opinion the policy or law. You usually work with others of the same opinion to get this done.

For people involved in policy decisions, it is not possible to assume the second or third role on all issues. In other words, we cannot be an educator or advocator on every issue. We must decide on which issues to become educators or which issues to become advocates.

Unfortunately, too many people do nothing about all issues. Assuming the role of an impartial observer (in other words, not getting involved), allows others to do our thinking for us.

Because it is impossible for you to be involved in every issue, you must decide which issue is most important to you. An issue may be defined as a controversy, a difference of opinion on how to improve something.

This publication will outline steps you might take to become active in influencing public policy. As you become involved, don't expect that all decisions will go your way. But don't think that your voice will not make a difference. For information on specific ways to affect policymaking, refer to guide sheets GH 3971, GH 3972 and GH 3973.

Get started

You may have several reasons for deciding to become involved with an issue. Perhaps an issue has a direct effect on you; you may be interested in something that you feel will make life better for others; or you may feel it is your responsibility to be active in making public policy. The reasons for getting involved are not as important as the fact that you are ready to take action.

To become involved you need two things: **Commitment** to find out the facts, organize your efforts and maintain the patience to see things through; and **common sense** to evaluate each possible solution and express your feelings to the right people.

You might want to get a feel for public decision-making by visiting places where information is gathered. Watch your local newspaper for a notice of meetings and hearings of councils, boards and commissions. Attend several meetings as an observer. This gives you first hand information on how that particular body operates.

Another way to start is to visit your state or federal representative or senator. Most state legislators are in their home offices on Fridays. Your newspaper will usually announce when federal legislators will be in your area. Check the phone book for a listing of a legislator's office in your community. Ask to be placed on their mailing list. Most legislators have some printed materials that they send to their constituents. Follow-up the visit with a thank you letter. Include a brief statement repeating any requests you made or positions you expressed.

In some areas, cable TV covers public meetings. It is helpful to attend some meetings in person, however, if you plan to testify but feel a little reluctant to speak before the group.

After you have become familiar with an issue and the way policies are made, you need to decide how you want to make your contribution. Will you make a personal visit to your government official? Will you make a phone call expressing your opinion? Will you testify at a hearing for or against a bill or policy? Will you work to get other people informed and involved? Or, will you use several methods to make yourself heard? Choose the method(s) that is comfortable for you and then get started.

Study the issue

Learn the facts. There is no substitute for information. Learn about other points of view.

Know the differences among facts, myths and values. A **fact** is a verified statement of what is. A **myth** is what some people think is fact. **Values** are what people think "should be." You cannot prove a value right or wrong and people with different values can reach different conclusions from the same facts.

The following is a list of what you need to know before taking action on a public policy issue:

1. What is the problem? Be sure to discern between the problem and its symptoms. Try to state the problem in neutral terms—it may be a question—rather than in terms of a symptom or proposal for change.

2. What are all the possible solutions and their consequences? Avoid classifying the consequences as advantages or disadvantages as you tend to immediately choose sides if you do. An advantage for one person may be a disadvantage for others.

In listing possible consequences, consider the effect on: families, health or safety, freedom of choice, quality of life, environment, taxpayers, employers, employees. Consider the long-range consequences to avoid making costly mistakes.

If you are a public policy educator, you are ready to begin the process of education. If you are an advocate, complete the following steps to prepare yourself for that role:

3. Define your position. Think through all the alternatives and consequences carefully. Decide which alternative you think is best. Your decision will be based on both facts and your values. Write down your conclusion and your reasons for making that choice. Writing it down helps to clarify thoughts and ideas. You might even change your mind at this point.

4. Become aware of the current status of the issue. It is usually best to become involved in an issue as early in the public policy decision-making process as possible. The closer policymakers are to acting on an issue, the more difficult it is to make a substantial contribution.

Find out what discussion has taken place and what action has been taken. This will help you plan the most effective approach.

For a report on the current status of a bill in the Missouri legislature, call 314-751-3659 for House bills and the "Senate Hotline" 1-800-392-0283 for Senate bills. For a copy of a bill in Missouri, call the Bill Room, 314-751-4555 for a House bill and 314-751-2966 for a Senate bill.

When requesting information about a bill, refer to it by number if at all possible. A subject index is maintained for bills from either chamber of the legislature if you are not sure of the number.

For a report on the current status of a bill in the Federal legislature, call Bill Status Office 202-225-1772. You may receive a current or historical report on either House or Senate bills. This office will give information on as many as six bills per phone call. Or they will do a maximum of three subject searches per phone call if you can identify only the subject. To obtain a copy of a bill at the Federal level, call Senate Documents Room 202-224-7860. This office will provide a copy of either a House or Senate bill, but you must request it by number.

5. **Determine who will be affected by the issue.** Is the issue local, state or national? Who has the most to gain or lose? What other groups and/or organizations are working on this issue? Do these groups share or oppose your position?

6. **Find out where the issue will be decided.** Will it be decided at the local, state or national level? If the decision is made at the national level, will state or local bodies need to follow-up to put the decision into action? Will the decision be made by councils, legislative bodies, commissions or regulatory agencies?

7. **Find out when the decision will be made.** Will the issue be decided in the near future or over a period of time? This is important in planning your actions to give the greatest impact.

8. **Recheck status of the issue.** Before taking action, find out where the issue is in the decision-making process. Has it been put aside for a time? Are public hearings being held on it? Is a special committee working on it? During your study, the status might have changed. It's important to know the correct status, so that you direct your input to the right place at the right time.

After this step is complete, take action.

Sources of information

As you gather information for your study of an issue, you will find that you do not go through the above steps one at a time. The steps provide a way of organizing information to be sure you have what you need to know. Information comes from a number of sources. The following is a partial list. From these sources you may find other places to look.

Newspapers. Read articles, editorials and letters to the editor. If an article has a by-line, contact that reporter. If a letter to the editor includes the writer's name, call that person. Watch for paid ads including names of people or groups working on an issue.

Meetings, hearings, planning sessions. Begin as an observer. Attend regular and special meetings of groups, special committees, etc. involved in an issue.

Organizations. Look for organizations concerned with the issue, such as school boards, PTAs, garden clubs, chambers of commerce, consumer organizations, and League of Women Voters. Talk to the president of the organization. Attend meetings to get acquainted.

Local libraries. Your local library is a great source of addresses, telephone books, magazines and general information on a variety of issues.

Your representative or official. Your representative may be a member of the city council, county court, school or hospital board, state legislature, or other governing bodies. An official may be a member of a commission or part of a government agency. Ask to be put on mailing lists.

Public agencies. Ask agencies for information. With the Freedom of Information Act, private citizens now have rights to information they have not had in the past. Ask to be put on mailing lists.

Political parties. Ask for positions and supporting information on specific issues.

Budgets. Study the budgets of government agencies, government bodies and organizations. Be familiar with income and expenditures. This will show you where their priorities are.

The opposition. Know who your opposition is, what they are saying, thinking and doing. Try to get on their mailing list. Take key people to lunch.

This is not a complete list by any means, but it is a start. Much can be learned from informal gatherings at coffee breaks, recreational facilities, etc. Don't overlook any source of information until you are sure it cannot benefit you.

It takes a lot of time and energy to prepare for involvement in public policy education or advocacy. But the results will be worth the effort.

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GH 3970 File: Family Economics and Management

Speak Up!

Be Sure Policymakers Hear You

Eunice Lieurance
State Family Economics and Management Specialist

Public policies are made to solve public issues. Public issues result from different opinions on how to solve a problem.

It may seem that people making policies don't try to find out how the people they represent feel about the policies. Citizens sometimes forget they have not only a right, however, but a responsibility, to be involved in issues. It is important to say how you feel about an issue that affects you, your family or community. Decision-makers do not always see all sides of an issue until people like you express their views. Guide sheets GH 3970, GH 3971 and GH 3973 provide more information on making your opinions known.

Getting started

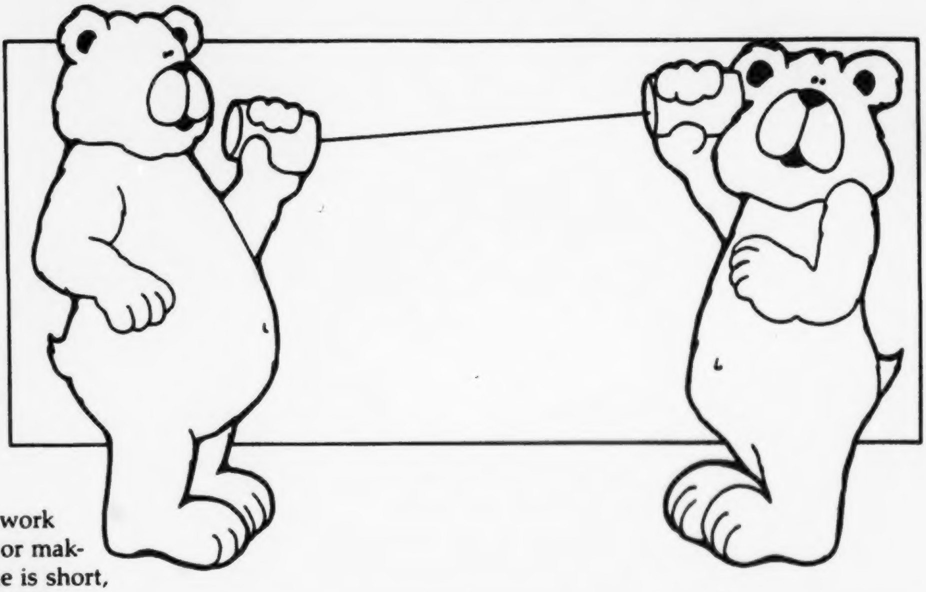
At first, your government may seem like a maze. A common barrier to people trying to get involved is simply not knowing where to go. Take time to get acquainted. Ask questions. Find out who the decision-makers really are. In most cases, much of the work is done by staff, committees and interested citizens like you before the decision comes up for a vote. This is the time when your opinion has the most impact.

Talk to all the people you can about public decision-making processes. In your own community find where informal discussion takes place (often in a restaurant or other place where community leaders tend to gather). Attend meetings of the city council, county commissioners, Chamber of Commerce, and board and committee meetings. Introduce yourself - don't just sit in the back row.

Once you find out who the policy makers are, you need to communicate your opinions. There are four methods you can use.

- Make a phone call.
- Make a personal visit.
- Write a letter.
- Testify at a public hearing.

Regardless which method you choose, your message won't get through unless you express your opinion in a way that will make people listen. Here's how.



Making a phone call

A phone call to your governmental official can work as well as writing a letter or making a personal visit. If time is short, a call can be even more effective.

Many citizens' groups or networks use the **phone tree** method as a quick means of making more input into a decision. This method begins with one person making two phone calls to alert the group that the time is right for their input. (In larger networks, or trees, three or four phone calls may be necessary.) These two people then call two more people who call two more until everyone has been reached. If one person does not answer the phone, the caller then calls the two people the person not answering was supposed to call. Each person in the network must have the home number of all other members. Each must also know who everyone is assigned to contact.

Phone numbers for legislators are usually listed in the phone book. Missouri also has a legislative hotline (1-800-392-0283) that gives you the address and phone number of all state legislators.

To find the phone number of a regulatory agency, board or commission, look under the appropriate governing body. For example, a state regulatory agency would be listed under *Missouri*. For federal agencies, look under *United States Government*. Municipal and county boards and commissions would be listed under the name of the *city* or *county*.

To effectively express your opinion by telephone, plan your remarks as well as you would in writing a letter or in giving a testimony.

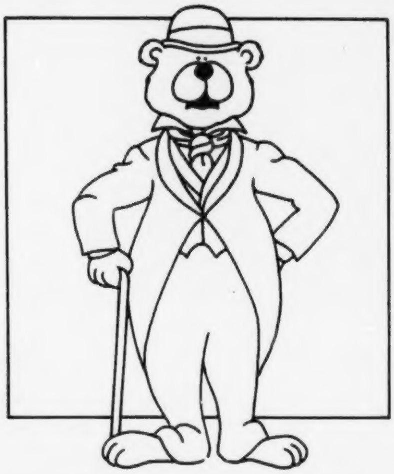
- Say who you are and why you are concerned.
- State if you are speaking for yourself or as a member of a group.
- Identify the issue you're calling about.
- Use the bill number if it is a piece of legislation.
- Explain briefly what you think should be done and why.
- Listen closely to the reply to your statement.
- Thank them for listening to you.

It is usually best to call about one issue only, but if you do talk about more than one issue, identify each issue and be sure your remarks are addressed to the right issue. You may want to make notes before making the call and take notes during the conversation. Above all, be organized, well informed on the subject, brief and courteous.

A follow-up letter of thanks is appropriate and welcomed by governmental officials. In this letter summarize the conversation (thus documenting the information) and thank the official for his/her time and interest.

Writing a letter

A brief, individually written or typed letter is appreciated by legislators or other decision-makers. This is an easy way for you to make your view(s) known. For specific information on writing a letter, refer to Home Economics Guide 3973, "Speak Up: Writing to Policymakers."



Making a personal visit

In planning a personal visit, it's usually best to make an appointment. When you call for an appointment, identify yourself and the issue or topic you wish to discuss. You can ask to see either your official or one of his/her top staff persons. You might also make an appointment just to get acquainted and to tell your official why you or your organization is interested in being involved.

Prepare yourself thoroughly. Organize your thoughts and rehearse the points you want to make. Listen carefully to what the person to whom you are talking is saying.

It is OK, perhaps advisable, to make notes of the points you want to make and questions you would like answered. Also make notes of responses to your comments and questions. It is helpful to provide the person with whom you are meeting with a summary of your views.

As with other contacts, a follow-up letter of thanks and a brief summary of what you felt was said is appropriate.

Testifying at a public hearing

Testifying at a public hearing is an effective way to express your opinion about an issue. If you have the chance, attend some public hearings or forums before you plan to testify. Then you will see how the process works, and you can better prepare yourself when you want to speak.

Public hearings are held to exchange information, ideas and opinions between policymakers and the general population. The policymakers may want to inform people about a problem. They may hold a hearing to get citizens' ideas about how a problem might be solved by legislation or regulation. Or, a public hearing might be held to find out how well a policy is working.

Preparing to testify. Know the issue. Read the proposed solution. Understand what it means and how it will affect different people. Talk to people with different views. Even if the hearing is informal, carefully prepare what you are going to say. You will feel more confident and come across as a competent person.

Ask questions about the issue if you want more information. You may have questions that others want answered, too.

Written testimony is important for a legislative hearing. Neatly type your testimony. If you are representing a group, your written testimony should include your name, date, the name of the group and the number of people in the group. Then present your thoughts. It is good to provide a copy for each member of the commission or committee hearing your testimony.

Giving your testimony. Stand and identify yourself immediately. Give your name and tell who you are, for example—homemaker, parent or resident of neighborhood to be affected.

If representing a group, name the group as you begin. State the position of the group. Tell briefly how member opinion was determined.

Outline the problem as you see it. Give your suggestion for solutions. Be clear, concise and brief. Point out how the proposal would affect present laws or procedures.

Address only one issue at a time. Stick to the subject. If you have detailed, technical information, don't include it in the testimony. Mention it and attach it to written copies of your testimony.

Avoid duplication. If several other speakers have already said what you planned to say, summarize these points and concentrate on a point that hasn't been emphasized.

Be prepared to answer questions about your testimony. If you don't have the information to answer the question when asked, try to follow-up after the meeting.

End your testimony with a one-sentence summary of your (or your group's) opinion. Thank the committee or board for the opportunity to testify.

Remember that the first time is the hardest! It's helpful for the beginner to get advice from someone who has experience in testifying. Contact the official in charge of the hearing to ask about the procedures.

Although you probably want to convince the other person(s) of your position, listen carefully to others also. Much can be learned by listening.

And remember: in all forms of communication, nothing takes the place of preparation.

References

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KEY TRENDS IN THE '90S

1. Social
   - Aging of America's population.
   - Growth in the number of elderly who work part-time.
   - Decline in proportion of children in U.S. population.
   - Increased number of children in crisis.
   - Greater proportional growth of minority populations.
   - Surge of new immigrants.
   - Growth of single-person households.
   - Growth of single-parent households.
   - Increased births to unmarried women, especially teen-agers.
   - Increased complexity in the role of caregiver.

   General Implications:

2. Political
   - Reduction of government services.
   - Growing role of state governments.
   - Loss of tax incentives.

   General Implications:

3. Economic
   - Corporate restructuring activity.
   - Continued increase of women and minorities in the labor force.
   - Increased numbers of well-to-do young professionals.
   - Persistent poverty and consequent homelessness.
   - Growth in the number of children in poverty.

General Implications:

4. Technological
   - Emerging computer and telecommunications technology.
   - Growing displacement of workers by automation and technological advances.

General Implications:

5. Work Place
   - Key shifts in work expectations.
   - New styles of management and organizational structure.
   - Variegated work place.
   - Decrease in entry-level labor pool.
   - Increased number of functionally illiterate workers.
   - Increased flex-time and job-sharing.

General Implications:

6. Health Care
   - Shorter hospital stays and release of patients "quicker and sicker."
   - Proliferation of free-standing health facilities.
   - Increased hospital restructuring.
   - Increasing options for consumers of health care.

General Implications:

7. Volunteerism

- Increasing non-cash giving by corporations.
- Changing motivations of auxilians/volunteers.
- Increased auxiliary accountability.
- Increase in Departments of Volunteer Services.
- Increasing competition for funds and volunteers.
- Increasing emphasis on fundraising.
- Increasing emphasis on high technology.
- Increasing number of "non-traditional" auxilians/volunteers.

General Implications:

Information on Trends #1-5 adapted from *What Lies Ahead? Looking Toward the '90s* by United Way of America

Information on Trends #6 & 7 compiled from work done by Arty Trost for the American Hospital Association.

MOTIVATION OF ME AND OTHERS

Dr. Eva Schindler-Rainman

The title of this presentation is "Motivation of Me and Others". Here we are talking about a human transaction and interaction. Motivating is strictly a human thing, as far as I know. It is a human transaction. It takes some doing.

Thomas Carlyle said: "The meaning of life here on earth might be defined as consisting of this: To unfold yourself, to work what thing you have the faculty for. It is a necessity for the human being, the first law of our existence." "To unfold yourself" - is that what we do in our jobs? "To work what thing you have the faculty for" and belief in. Are we working at a job for which we have faculty and ability and in which we believe? Thus, motivation starts with us - we must be clear and convinced about that, and skillful in what we are doing before we can motivate others.

That's why the title reads: "Motivation of Me and Others". It starts with us. Have you ever seen a football coach work with kids or adults? Unless he has loyalty to the school and a wish for the team to win, he certainly can't imbue it in others, can he? Motivation starts with us, then. What does it mean? I think it means that there are both conviction and action - or both thought and doing. Other ways of saying it might be: convincing for doing - influencing toward action - causing to be done - drawing oneself or others out to do. It means not only setting our humanity to work, but also knowing why we want to set it to work in us and others.

So, in this paper we want to make explicit what factors and forces are needed to cause motivation to happen in us and others. And this is really necessary if we are to set human forces to work that are necessary for work. We have to be clearly motivated if we are charged to motivate others. That is our job. The opposite of motivation is apathy, and no organization can run on apathetic fuel - but it does run on motivational fuel.

James Reston said: "The truth that makes men free is very often the truth they do no like to hear" but let us take a stab at some of these kinds of truths. This paper is divided into three parts:

1. the process involved in motivation;
2. what we need to know about ourselves to motivate ourselves;
3. what we need to know to motivate others.

Process of Motivation

What then are the motivational issues and processes involved? One of the first ones is opening up to recognition and acceptance of a problem, issue or task. Here is an example: I was asked once to motivate people in a poverty area to set up a bureau to recruit volunteers. I was very clear about my deep belief in the value of voluntary agencies and volunteer service. The problem was, how to interpret, communicate and then motivate people who might feel differently about volunteering. Opening up the issue meant finding people, communicating to them what we were trying to do and setting the kind of atmosphere in which they might be able to participate. At the first meeting, to which thirteen local citizens came, one women said, "Well, Eva, it's very exciting to be here, but I want you to open that red notebook and you must give us the plan and tell us what is in there because we know you've got it all planned." I opened the notebook and there was a blank page. How do you motivate people with a blank page? It worked very well because what I said to them was: "I don't have any plans. We have some money to see if we can open an office and begin to recruit volunteers, but it's up to all of us to do the planning." Thus, the committee plotted and planned the program from the inception on the volunteer bureau project. This motivated people. They had ownership of the plan. In the first year, seven hundred volunteers were recruited. These were people who had never volunteered before.

Secondly, understanding of requests made, problems stated, tasks required. Understanding is not something that happens overnight. Sometimes, after you think something over that you thought you understood, you say to yourself: "I don't know, did I understand?" Understanding motivates. It means that we, who are trying to motivate, must be reasonably sure that people do understand. It is necessary to get some feedback that says that they do understand, not just the phrase, "Yes, I understand." Have you ever directed somebody to your house, for example, and they say "Thanks - I know just how to get there." Half an hour after they are supposed to be there, you get a frantic call, "I'm lost, what do I do now?" Understanding doesn't come quite as easily as some of us wish it would. It is also very hard to admit when you do not understand because in reality what you are saying is, "I am not so sure. Maybe I am not as smart as I thought. I have to admit to you that I did not get it." But to motivate you have to understand what you are doing, why you are doing it and to ask questions about that which is not clear.

That leads to the third process, involvement - involvement in definition of task and thinking through of objectives. The kind of involvement that the aforementioned thirteen poverty area citizens had in trying to figure what a Volunteer Bureau could do in their area. And when this became clear, they hunted for and found an office. Also, all the furniture in the office was either bought, borrowed or refurbished in the neighborhood. All the kitchen utensils were donated by citizens who said, "We want to help." Involvement - action involvement as well as thinking involvement.

Also important is communication-on-going - as between the recruiter and the recruited.

Communication is a two-way process. It is an arrow that has points at both ends. You do not communicate one way - that is a one-way transaction. You may be speaking, you may be teaching, but teaching is one thing, and learning another. A teacher cannot learn his students. He may teach them but the learning has to take place by the student himself.

Next is a process called feedback. Feedback means you get some kind of reaction to what you have been trying to communicate and it will tell you if you have been communicating. Feedback should be reciprocal and there needs to be feedback on the feedback.

Experience is another motivational factor. Sometimes people are motivated through actual experience, not be hearing it, but through participation, trial and error. Sometimes mistakes motivate people to try again, to change their behavior or style, to do better.

Support is part of the process of motivation. An experience with some new volunteer recruits now working at a General Hospital comes to mind. These recruits are also poverty area volunteers. They have been recruited to be the "connectors" between the physicians and the poverty area parents who do not understand the physicians very well. The job of the volunteers is to help the doctors and patients understand each other better. Before recruiting the volunteers, the chief pediatrician talked with the potential volunteers so they could get to know him. Then he invited them to come to the hospital so they could look at it and ask questions. From then on, regular "staff: meetings, individual and group, were held to help and to support the new volunteers in this new setting.

Problem solving helps to motivate - especially problem solving with a maintenance of uncertainty. Research has been done on what motivates people. One of the recent research projects was done on the American Expedition to Mount Everest. One of the fascinating things discovered about what motivated the men to climb the mountain was that they were involved in problem solving. Even when there was little oxygen and when they were really tired, they would be reawakened if involved in solving a problem in relation to the expedition. For instance, when it came to deciding who was going to climb which side of that mountain, or who would be the lucky one to raise the American flag, or who would be the one to hold camp while the others got to climb, the men were re-energized because problem solving became a highly motivational factor. Therefore, problem solving which maintains some amount of uncertainty maintains enthusiasm and maintains motivation to work on the problem.

Decision making also motivates people, especially group decision making. But when this decision gets made too fast, the challenge is gone.

Another thing that is a motivational objective is the alternative solution search. That is asking the question: "What are all the possible solutions to a given problem?" This means maintenance of nondecision tensions. That is, we cannot make a decision until we have looked at all the possible alternatives. There are organizations with no tension about decision making, because there is a manual on everything. The position maintained in this paper is that there are no problems without alternative solutions. There may be better and less good solutions. They may be better in this situation than in that situation; alternative solution search motivates people to work. It implies that there is some kind of possibility wherein everyone can have a part in looking for the solution - whereas the quick solution implies control and quick closure and simple solution. The easy finding of the solution means control to many people.

Another motivational issue is the commitment to action, often with the concomitant resistance to action or change. Resistance to change is a very important motivational factor because when you can work on decreasing resistance it is followed by action that is rewarding, successful and recognized, both through applause and constructive criticism.

Lastly, an important motivational issue is learning - growth in skill, knowledge and problem solving. There are some steps to this kind of problem solving that can be enumerated here. Begin with the feeling or the sensing of the problem. That is the status quo of condition. Then move to the diagnosis of the situation. Next is the search for goals, which includes a formulation of goals. Now choose a means of action, after looking at alternatives. Now you must plan - and planning means a commitment to effort because you do not plan something that you do not, at some point, hope to do. Next, try it. This is preparation for action.

Next, there is the doing - the single action try - whatever that happens to be.

And lastly, evaluation, which is built into the program because you have to seek ways of getting feedback all the way through if you want meaningful evaluation.

What Motivates Me

It is time now for a look at what motivates me. What is involved here is knowledge of self - how I perk or how I behave. That is a very easy thing to say - fascinatingly easy - but very hard to do. In a training group, a forty year old member and a professional person were speaking. He was going on and on and on about how he presented plans to a City Council. One of the other members said to him, "Oh for goodness sake, is this the way you present things to the City Council? No wonder they don't listen to you." The first member said, "What do you mean?" The reply was, "You just talk on and on; do you have any idea that no one over here is listening to you? You talk in paragraphs. It is impossible, I don't know what you have been saying." As it turned out, after the speaker had analyzed the constructive criticism, he felt that his talking too much and too long was why he had run into resistance with the City Council and with his staff. And yet he did not know this about himself at all. Nor did he realize this need to make a sermon every time he had a statement to give out.

Another thing that motivates me is knowledge of why I am working with XYZ organization. This does not mean generalities like serving humanity or is it a good organization? But why, basically, am I working for XYZ? Why here and not somewhere else? This is something about which we need great clarity. Why am I mainly working with a voluntary organization and not in business and industry? One has to be clear on these things if one is to motivate others or communicate with them. And this is tied to: What are my values? One important value I have is that one of the most important aspects of a democratic society is the voluntariness of it, as compared to other systems. And unless we gird and undergird this voluntariness, we are going to lose it. We shall then lose something our country's forefathers thought important. Voluntariness means doing for others because you want to, because you have been motivated to do it.

What are my commitments to myself, to my outside life, to my organization? Commitments are a part of motivating.

Next, we need to know what excites us, what makes us want to do things. What are the greatest things that get you "revved up?". Deadlines, for example, do it for some people. What really motivates us? Perhaps it is being in a conference where new ideas are born. There are many persons who get excited after the ideas are formed, but they do not want to help bear them. But the question really is, "What excites me, so that I can help motivate others? What excites me may not be at all what excites you, and that is all right.

On the other hand we need to know, "What slows me down?" What frustrates me? What decreases my coping level? You know, the kind of things that make me want to throw up my arms and say, "It isn't worth it." Some people get frustrated much sooner than others.

Next, how do I relate to others? What do I know about how I relate to others, and how do other people see me? And do I really want to know how others see me, do I ever really give them a chance to tell me? We talk so much about evaluation, but we so rarely use what we get. This is one of the reasons some of us take a dim view of post meeting reaction slips, unless post meeting reaction slips are used to make the next meeting better. Now evaluation means evaluation for the purpose of feedback, to do something better or differently. How often do you really encourage others to tell you how you perk? In our society we have an interesting kind of dilemma. We are a society which likes to be pleasant, by and large. We are uncomfortable around un pleasantness and hostility. We like to give each other compliments, and find very hard to tell each other, "Gee, you could have done that differently" or, "Yesterday morning, what was the matter with you?" It is usually easier to give feedback than to receive it. It is hard not to get defensive when one is criticized. As human beings, if we want to "rev up" our skill, we somehow have to open up some little crack in our gray matter that says: "I'm willing to have you help me".

Next, what maintenance conditions do I need to operate at maximum level? That is, under what conditions do I operate at my best? Some of you work well in a great big open office where everybody can see everybody. Others wish there were a wall around them and a ceiling above, so no one can hear what is going on.

Different people need different kinds of conditions. Are you in the kind of situation that allows you to operate a maximum level and be motivated?

What kind of new experience do I need? Or, am I the kind of person who does better with things that are true and tried?

Motivating Others

Now let us turn from me to others. What do I need to know about others to help me motivate them? It is hard to do this topic justice because there is so much we need to know about others. Perhaps the first thing to do is learn something about their needs.

What are others' needs for caring, being cared for, being cared about? What are their needs for recognition We often make assumptions about things like this. We assume, for example, that everybody is motivated by three, five and seven year pins. Some people are not, and some people are pin collectors and love it. What kind of recognition is to meaningful to whom? Some people think the best recognition is to hear: "Gee, but I'm glad you're here this morning." And that makes their day, because nobody says it to them at home. And perhaps nobody has ever told them that they are important.

What about the need for success? People may volunteer their services in an organization because they have a need for success. It may be success in writing letters, or success in leading small or large groups, or a variety of other activities. But in order to motivate, we need to know what needs different people have. An example of a young nurse enrolled in a leadership training course comes to mind. Twice she did not come, but the third time, when she came, we said to her, "Well, it's nice to see you. Do you think your schedule will allow you to come now?" And she responded, "Well, let me tell you something. This is something I have just got to be successful at. My motivation is to come, but I get scared, and then I don't make it; so could you pick me up just once so I'll be sure and come?" And when she finally got there, the group said to her, "Gee, Beverly, we are so glad you could come." From then on she got there under her own steam. She just needed a successful, continued kind of responsibility experience.

What kind of success? Not everybody is looking for material goods and money. Not everybody. Perhaps it is a simple telephone conversation. Someone with a lilt in his/her voice calls and you say, "Hello, this is Mary," and he/she says, "Hello, Mary, it's good to talk to you." This can be a success experience. Success has many different meanings for all of us.

What about the need for growth and learning? In voluntary organization, we get people motivated and get them under our roof, and then we say "Aha, we've caught you!" As if we had a butterfly net and could keep them under it. Yet, if you want continual motivation, you have to look at people's needs in terms of growth and learning. But growth and learning are to a degree motivated because there are new opportunities.

What about the need for creativity? Most human beings have this need. But to what degree do we use that knowledge to motivate someone? There are needs for creativity. What are some of the jobs in communities that offer some satisfaction along creative lines?

Also, there are needs for support. How aware are you that we all need a lot of support? "At the elbow support," "over the telephone support," all kinds of support, that says "We are glad you are here." I think this is just true of people.

We all need support. Yet, often we get new people and we launch them like a ship, and say "Go ahead and sail." Another example of this is in a neighborhood where the people who are volunteering are new and inexperienced. They need an initial injection and then booster shots to keep going. The booster shots are important, even if it is a mild one like saying: "Hey, you're doing great!"

The need for belonging is one many people have and some organizations build on it. Many persons are much more motivated to serve if they feel they belong, rather than if they feel like outsiders.

There is the need for meaningful work. Not just a need for work, but for meaningful work. Even sticking envelope flaps together and stamping envelopes can be made meaningful. All the envelope licker might need to know to find the work meaningful, is why one thousand envelopes need to be licked and sent out. Also, how pleasant do you make the task, and how related is it to what is going on in the rest of the organization?

Problem solving is important. Many people have a need to solve problems, and to make decisions, and they don't want others to solve them for them.

The need to give of themselves, their talents, their skills, their ideas is at the very core of persons' needs. To what extent do we motivate people by encouraging them?

Then, there is the need for power and influence. Some people are motivated because they know their name is going to be on the left side of the stationery, or they are going to have a title, or they are not going to have a title, but can be influential behind the scenes. In the United States, voluntary organizations are one of the avenues left open for upward mobility for people. There is nothing wrong with moving upward. In our society it is considered a good thing. Have you ever heard someone say to his boss, "I don't want to be the project engineer, just let me be the engineer." And the boss says, "Man you've got no ambition." The engineer might have ambition, but not of the upward mobile variety. Yet we assume that all people want to move upward.

We also need to know about others' interests, others' resources, others' skills. Often we get threatened when someone has more skill in something than we do. And if someone is really skilled in the same area you are, this can be a really threatening situation. This, incidentally, has been one of the greatest hindrances in using nonprofessionals in programs, because when the nonprofessional does as well or better that the professional, it can be a threatening situation for the professional.

And that brings us to the next point. What knowledge has the person whom we are trying to motivate about the program with which you are working. Often is assumed that everyone knows about the program, yet most people do not know the multi-functional nature of programs, services, scopes, etc.

What else do we need to know about others? Their questions, their uncertainties, their doubts. To motivate them you must know these facets also.

And lastly, we need to know about people's other commitments. Commitments vary greatly. One might be committed to a church, or to improve the ecology, or --? In order to motivate others, we need to know these commitments. Perhaps we can help them to connect the other commitments they hold near and dear to commitments for your agency.

Conclusion

In conclusion, let us look at how we tie "me" and "others" together. My relationship to others becomes then the binder to motivating me and others. Day by day, and moment by moment, people go through life looking uncertainly into the eyes of others, looking for that flicker of "yes" that confirms the essence of being.

"It is from one man to another that the heavenly bread of self being is passed," said the great theologian Martin Buber. "Man can become whole not in virtue of a relation to himself, but only in virtue of a relation to another self." So what Buber is saying is, you cannot look at motivation by just looking at the self. You can look at it only by virtue of the fact that one person relates to another. Then on can get some feedback about the essence of his/her being, real basic concept - that a person finds real existence, real reason for being, real motivation, only in conjunction with another - forms the keynote of the teaching of Martin Buber. In an era of mass organized technology where people lose their individual identity and become a number, Buber insisted that genuine life arises only through deep interpersonal relationships. "All life is a meeting." Existence cannot be possessed, but only shared in. "Do not withhold yourself." Indeed, do not withhold yourself. As you are motivated, so you will motivate others.

Common Problems in Volunteer Groups

Working with volunteers can be exceptionally rewarding or extremely frustrating. A volunteer group with the basic skills for success is an extremely exciting and enjoyable client; a volunteer group without these skills can be frustrating.

These remarks are addressed to consultants who work with volunteers, managers who use volunteer labor, and chairpersons of voluntary groups.

The "voluntary group" may include several organizational structures: the totally voluntary community group; the funded organization dependent on volunteers to function; and committees or groups within institutions (especially schools) established for a specific purpose. These structures share a potential for serious problems, and the problems should be diagnosed collaboratively by both the consultant and the volunteer group, before solutions are suggested.

Five recurring problems characteristically emerge in volunteer groups: too many goals, lack of an adequate contract, lack of leadership and accountability, lack of rewards or recognition, and lack of attention to group process.

TOO MANY GOALS

Most volunteer groups attempt more than they can accomplish. Their goals are usually so broad and vague that they create frustration in volunteers, leading to rapid turnover. Often the effort fails. One major goal in working with volunteer groups is to push toward specific, achievable goals. Achievement leads to a feeling of success—the only thing that can sustain volunteer effort. All other problem solutions mean little unless members feel that they are progressing toward an achievable goal. Several methods may help groups set realistic objectives. One method, based on consensus and group decision-making, is for volunteer groups to set aside a block of time to devote totally to planning.

Planning Workshop Design

Step 1. Brainstorming, or having each member make a list of all possible action plans for the group, is an effective approach. The ideas can be recorded on newsprint. If the group is larger than ten to twelve members, subgroups can be used, which can then present their ideas to the total group.

Step 2. The leader asks the group to pick the three or four most important priorities. Experience indicates that no imposed process (i.e., brainstorming, weighted voting, etc.) should be used for this decision. The group should use its usual decision-making method.

Step 3. Once priorities are established, the group sets aside the lesser ones. These ideas will be available when the group has the time for them.

Step 4. Group members then decide on their desired goal, or, in other words, "How will we know when we have accomplished our objective?" The inability of the group to answer this question invites frustration.

Step 5. Individual program charts are useful for each objective. These charts should include answers to five questions:

- What will be done?
- How will it be done?
- Who will do it?
- When will each task be completed?
- By what date will our objective be accomplished?

Step 6. At each group meeting these objective charts become the first agenda item. The question should be "Are we keeping pace with our goals?" The purpose of all meetings is to move the group toward its objectives.

Reprint. Common Problems in Volunteer Groups, Ed Bancroft,
The Annual Handbook for Group Facilitators, 1975.

LACK OF AN ADEQUATE CONTRACT

One of the broadest and most basic problems facing volunteer groups is the lack of an adequate contract between the group and its membership. Most groups and organizations are not explicit about expectations for their members. Most groups also do not allow the members to indicate their resources, experience, and backgrounds. Hence, a specific agreement between members and the organization regarding what each person can and will do is rare. Discovering members' resources and establishing members' time commitments usually occur informally and haphazardly, costing the group much maintenance time. Underutilization of volunteer skills and experiences is often the result. There are several methods for developing this specific contract.

Group Meetings

A group meeting to share individual resources and group expectations is useful. Members are asked the following questions and record their answers on newsprint.

- "What resources do I bring to this group?"
- "How much time per month can I devote to this group?"
- "What do I expect from this group?"

Members then can introduce themselves to other members by presenting their newsprint sheets.

Individual, Written Job Descriptions

Specific, written statements of expectations for each volunteer help clarify individual responsibilities. Each member may first write a specific job description for himself. Included in this description could be the time and days he is available, what responsibilities he will have, and what specific roles he will play in achieving group objectives. Then this job description should be developed with the volunteer leader or other members. This process helps develop a coordinated effort toward organizational goals. Each member receives copies of all job descriptions so that he will know where to direct certain kinds of work.

Permanent Agenda Item

Asking specific questions at every meeting will legitimize explicit discussion about members' mutual expectations. A permanent agenda item could be "Are we fulfilling our individual job descriptions?" or "How should they be changed or updated?"

LACK OF LEADERSHIP AND ACCOUNTABILITY

Reluctance to confront the problem of leadership accountability is common in volunteer groups. Since volunteers are not paid, this issue is especially uncomfortable. Failure to establish adequate leadership structures and to make members accountable for their responsibilities can be extremely serious. There are several ways to avert this.

Project Leaders

An effort should be made to select project leaders for each major program attempted. If possible, this task should be assumed by an active volunteer. The project director is responsible for seeing that the project is successfully completed. Program charts and job descriptions will aid in getting volunteers to accept responsibility.

Volunteer Coordinator

Many budgeted organizations do not provide adequately for volunteers in their structure. If the money is available, a full-time volunteer coordinator is useful to maximize the contribution of volunteers. If it is not possible to have a full-time coordinator, a staff member can be given this duty. This person links the paid staff and the volunteers. Without effective linkage, the volunteer effort may be very disorganized and haphazard.

Regular Staff Meetings

The volunteer coordinator conducts regular volunteer meetings, intended to examine progress toward objectives, to exchange volunteers' information about their work, and to air problems. These meetings may result in a sense of group cohesiveness and a climate of support.

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Orientation

Another function the volunteer coordinator can perform is to orient new members to the group or organization. The more time spent on orientation, the quicker the volunteer becomes a working member of the organization. One orientation method uses the "buddy system": assigning one volunteer to work closely with each new member, to answer questions, and generally to familiarize him with the work. The veteran member can also assist the new member in developing a job description.

LACK OF REWARDS OR RECOGNITION

A major failure of staffed organizations lies in neglecting to recognize volunteer efforts. Volunteers quietly assist the organization but may not be recognized for their contributions. Volunteers should be rewarded for specific accomplishments.

Staff Openings

Qualified volunteers should receive first consideration for full-time staff openings. A job also might be subdivided into part-time components so that two or three volunteers could receive payment for their efforts.

Grants for Volunteer Expenses

It is expensive to volunteer. Baby-sitting, lunch, and transportation costs must be absorbed by the volunteer. Several Federal government programs (e.g., ACTION and OEO) compensate volunteers for these expenses. It is possible that a particular volunteer program would qualify for Federal funds, local foundation grants, or United Way support.

Training

Volunteers could be invited to community or staff training programs, which could help make volunteers more employable.

LACK OF ATTENTION TO GROUP PROCESS

Most volunteer groups do not give adequate thought to how they work together. Decision-making methods and other group norms are not determined explicitly. Group-process activities can aid the group in becoming more effective.

Workshop on Process Issues

Structured experiences, role-plays, and discussion may help the group generate process objectives for improved functioning. For example, an objective might be "Our group will solicit views of quiet members" or "We will attempt to make our decisions by consensus as often as possible." The group should design these process objectives for itself. These could serve as a check list for future meetings and provide structure for a process observer.

Process Observer

One group member may be assigned as a process observer. The existence of this role makes group dynamics a legitimate discussion item. The observer points out those items that are hindering group effectiveness and suggests preventative actions. Examples would be persuading the group to pursue the subject or preventing certain members from dominating. The role of the process observer could revolve so that all members become accustomed to observing process. A check list of process objectives could be an important aid for the observer.

Agenda Item

Regular agenda items for meetings can sustain the group's thinking about its process. The question might be as simple as "How are we performing as a group?" More complicated instruments can also be used. However it is accomplished, it is important to continuously monitor process.

CONCLUSION

The five problems discussed here are common to volunteer groups. Knowing how to confront difficulties with goals, group-membership contracts, leadership responsibility, rewards, and group process can make the work of these groups effective and satisfying. Attention to these problems can reduce the frustration and increase the excitement of working in volunteer groups.

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TRENDS AND CHANGES IN THE VOLUNTEER WORLD

by Eva Schindler-Rainman, DSW

"MAY YOU BE cursed to live in interesting times," is an old Chinese proverb. It denotes so clearly the themes that underlie the trends and changes in the world, and therefore also those affecting volunteerism. Volunteerism has an exciting and important past, and has an even more promising, multi-faceted, and more creative future.

The 1980s and 1990s will be most exciting periods for volunteers, staff working with volunteers, and for the systems with volunteer opportunities. The changes that are occurring are rapid and complex, both national as well as international. We are in a time of transition which enables us to be creative, non-traditional, energetic, and bound by nothing but human limitation, turfdoms, lack of vision, or resistance to change. Indeed transition may be the key complex concept that characterizes where the volunteer world has been, and where it is going. We are living in the post-industrial society - the service society or the Third Wave society, as Alvin Toffler calls it. It is a time of change, challenge, and explosion.

The profile of the volunteer has also changed during the last 50 years. Today a volunteer might be any person, from three to 103 who gives time, energy, skills, knowledge voluntarily to a chosen cause or activity, and without monetary profit. Volunteers come from all religious, racial, ethnic, and lifestyle backgrounds, and there are also many handicapped people who volunteer. The vast majority of Americans are available to volunteer in their neighborhoods, in their cities, and/or to work for special causes. But the fact that these people are available does not necessarily mean that we know how to recruit them as yet.

There are several categories of volunteers available:

Direct helpers: These are people who give a direct service to others. This may be done on a one-to-one or one-to-group basis. Included here are such services as tutoring; driving sick people to appointments; helping clients in an Internal Revenue office; shopping for the elderly; and taking care of stray animals.

Decision-makers: He or she is the board member; an administrative volunteer; the volunteer who makes policy. Anyone can learn to be a decision-making volunteer, and there is beginning to be a larger range of persons on boards of trustees, commissions, and committees.

The connector or linker: This is the volunteer whose major job it is to connect persons to available services, or available services to potential clients. These may include persons who connect clients and patients to public health clinics and centers, or the person who connects adult volunteers to work in our schools.

Cause volunteer: These people volunteer to work for a particular cause, like Heart Association, Amnesty International, the local rape hotline - people who want to get involved with an organization or system that operates in an arena which is of particular interest and importance to the volunteer. There may indeed be two kinds of cause volunteers - those who advocate, and those who work directly with making change happen. The change agent volunteer, for example, might be a person who wants change to happen in organization, and thus becomes a member of the board of directors in order to help the system change in an orderly fashion. An advocated volunteer is one who advocates particular positions, be they political, economic, or in the health and welfare arena.

The monitor volunteer: This is the volunteer who is specifically recruited to monitor programs and functions, and make sure that they are being operated in accordance with standards, policies, and the law. For instance in some localities volunteers have been recruited to work in nursing and old-age homes, both as program participants, and as persons who make sure that the patients receive all the necessary services. Indeed, there has been some legislation into which monitor volunteers have been written.

There are also people to whom volunteering is therapeutically prescribed, and who volunteer as part of a mental health program that will help them become reactivated, or resocialized in a variety of ways. There are also people whose major function it is to do fund raising and/or research.

It is clear, as George Gallup Jr. has stated, that volunteerism is important in our society, and voluntary efforts of an estimated 60 million volunteers and voluntary organizations, are what keeps democracy going, by doing much of what government otherwise would have to do.

Volunteer influence and power is on the increase, and the" Third Sector," as Peter Drucker calls it, is a viable, important force in American society today. It is also growing and becoming a force in other countries around the world.

Here are some of the trends and changes in the volunteer world, as well as some of the changes these trends are causing.

Changing, older, newer populations

Our society is becoming older, and we are seeing the end of the youth culture. The median age of the population is approximately 30, and that makes it clear that more persons will be available in the older age ranges, and more of these people will be in need of services. In addition, society is becoming more and more varied with an increasing number of persons coming from new and different cultures - Hispanic, Asian, and Polynesian, to name a few.

The availability of these new populations means that we need to find new and different ways to tap into the motivations of people who volunteer. It is estimated that 82% of the population is willing to work on a variety of issues, but it will be necessary to develop new and different recruitment methods to involve the new and older populations.

This trend, then, offers challenges of change, including the need to develop methods to tap into intergenerational and intercultural wisdom; to develop culturally suited involvement methods; to develop community wide resource/skills banks, and centers where persons can let it be known that they wish to volunteer and can be helped to get connected; to develop "touch and go" exploration opportunities for potential volunteers before they decide where they wish to put their energy and time; to develop volunteer personnel policies and record that make the volunteer work place as humane and useful as possible; to develop new volunteer jobs, and some of a more temporary nature than in the past.

Doing more with less

It has become very clear that as federal human service budgets shrink there are important implications for the volunteer world. "Smaller can be beautiful," but it is a very uncongenial idea when at the same time we are living at a time of increased expectations, of more needs, of more sophisticated constituents, and in a society where more and more extensive and complex integrations of wisdom and technology require higher levels of skill and interdisciplinary competence. To respond to this crisis of opportunity, it is clear that volunteer power is needed. The late Edward C. Lindeman once said: Volunteers are what holds democracy together," and he asked us to imagine the results if all the volunteers in the United States went on strike. It became very clear that much of the work of both private and governmental systems would stop if that occurred. The challenge of doing more with less includes mobilizing volunteer energy; exchanging and sharing resources; merging and overlapping activities and services; finding new sources of funds; voluntary reduction of overhead costs; discovering new ways to deliver old services; moving towards collaboration and interdependence of disparate systems, services, and groups, utilizing the reciprocal and complementary resources available in more creative ways. Human service teams that cut across professional and volunteer lines are another development that will be helpful in providing better services.

Human Underutilization

Closely tied to the trend of doing more with less is the concern about human underutilization. A new field of human resource development is emerging as a result of this concern. This needs to become part of the volunteer world also. This concern includes thinking about better opportunities for retired people; for persons who are physically and/or mentally ill; or people with language or other educational limitations and/or different values and life-styles.

Changing values

We are living in a time of changing values, from an emphasis on conformity to an appreciation of pluralism and the beauty of difference; from an emphasis on quantity to one on quality, or demassification; from an emphasis on rootedness to one on mobility; from an emphasis on long-term commitments to an appreciation of temporariness and very short commitments; from an acceptance of authority to confrontation; from the definition of success being upward mobility to a definition that is more situational stating that success is what helps actualize the person; from little or no focus on mental and physical quality of life to a heavy emphasis on both of these.

The challenges here include development of more temporary volunteer opportunities; and emphasis on the beauty of difference and new and better ways to utilize differences; increasing the discussion and therefore the understanding of value and lifestyle differences; the need to emphasize alternative plans, job descriptions, and ways of work; the need to learn the skills of conflict utilization and resolution, and the art of creative compromise; to develop flex-time and job-sharing in the volunteer world.

Corporate sector social responsibility

It is clear that during the past few years the corporated world has become increasingly involved in, and interested in the volunteer world. Many large, and now also some small companies, have a vice president in charge of community relations for volunteers, who is responsible for seeing that employees have the opportunity to volunteer in causes of their choice in the community. This volunteer service becomes part of their employment records. An organization known as Involvement Corps has been active for the past several years in helping corporations develop volunteer programs for their employees.

It is also clear that many corporations in addition to human resources have financial resources available. The corporate world feels that it is important that the private sector stay alive, and indeed become increasingly more potent, important, and visible.

Challenges here include the need for non-profit organizations to learn about and connect with the corporate world; to develop relationships with officers of corporations who have been designated as community liaison persons; to invite corporate persons to participate in agency activities; to discover which corporations have grants and funds available for the non-profit sector; to learn approaches and skills in working with the corporate sector.

It is clear that volunteerism will flourish as never before because of the efforts and the interests of the government, nonprofit, and corporate sectors.

Changing technology and communication resources

Rapid change in socio-technical systems is affecting the volunteer world also. There has been such complex and fast development in computer technology, including home computers, and computer conferencing across great distances. Increasingly this technology is becoming available to organizations and institutions. Cable television, video and audio tape advances, word processing, telephone lectures and conferences make it possible for human beings to communicate in a great variety of ways. Indeed, these developments are the foundation for people to get together to develop a variety of causes and services in new ways, in spite of shortages in and high cost of environmental energies, and a shrinking budget.

The challenges here include increasing our knowledge about and skill in utilization of these technologies; to involve knowledgeable persons on decision-making bodies as volunteers; to develop some sophistication about costs and trade-offs in relation to the utilization of these technologies; to help train people in the use of new ways of work, and new machines.

The science of futuring

There is an increased emphasis on futuring and future planning. This becomes necessary as projections of human material and environmental utilization are more carefully looked at, and more urgently realistic. Some of the emphasis in terms of need for careful future planning is on working with diminishing resources, developing survival skills in the forecasting of new programs and services.

The challenges here include the need to learn realistic and useful planning methods; to involve persons as consultants who can help with futuring and realistic views of what the future will be like, as far as that is possible; to involve persons from all levels of the system in doing future planning; to collaborate with other groups in future planning.

Of course the biggest challenge here is to get involved in looking at the present and the future, and combine the resources of outsiders, volunteers, and staff in planning for the future of the many necessary services in the volunteer world.

Volunteer world in change

It is clear from the above trends and changes with the many challenges that the volunteer world itself will have to continue to change. It will be necessary to develop new opportunities, places and spaces for volunteers to serve. Volunteers will need to have important roles in all sectors of community, including recreation, religion, education, business, politics, the media, and human services of all kinds. The social action emphasis of citizen involvement will increase, and it will be important for volunteers to affect such movements as the patient rights movement, neighborhood and quality of life movements in their arenas. Volunteers will increasingly become the social change agents of our society.

The changing times require the volunteer world to act rather than re-act; to welcome today and tomorrow rather than to prolong the yesterdays; to create and innovate rather than to depend only on the traditional; to guide rather that goad; to involve rather than mandate; to encourage interdependence rather than separate turfdoms; to welcome change rather than resist it; to be excited, puzzled, and optimistic rather than depressed, powerless, and overwhelmed.

Today is yesterday's tomorrow, and the future of volunteerism is exciting, bright, and challenging indeed for all of us.

Eva Schindler-Rainman is a consultant to national and international business and volunteer organizations. This paper was presented at the 1981 AMA Auxiliary Leadership Confluence. A bibliography of suggested reading compiled by Dr. Schindler-Rainman is available from AMA Auxiliary Headquarters.

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The Practice of Excellence in the Volunteer World

Eva Schindler-Rainman, DSW

Taken from comments made by Eva Schindler-Rainman the opening evening of the AVA National Conference on Volunteerism in Milwaukee, October 1983.

My chief commitment is to voluntary citizen-human participation in causes, efforts and activities, which are voluntarily chosen, and to improve the quality of human, animal, and other organic or inorganic life in some way.

I feel that volunteerism is the thermometer by which the temperature, indeed the health, of our democracy can be measured.

Volunteerism for me includes beliefs in:

- human dignity and diversity;
- humaneness;
- equality of opportunity;
- respect for and appreciation of the beauty of difference.

Volunteerism offers opportunities:

- for life long learning;
- to give and share ideas, skills, knowledge and services;
- to act;
- to help change to happen;
- to extend and enrich a large variety of services to others;
- to strike all chords (from Rock to Mozart).

"Excellence" for the volunteer and the professional leader includes:

- Caring about the job and all the people connected with it, as well as the mission of the particular system.
- Personal and professional growth involvements.
- Interacting and sharing with other administrators and persons in and out of the Volunteer World.
- Being challenged by change.

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- Acting as leader, enabler, connector, communicator, and as a positive, optimistic, forward looking, enthusiastic, productive example.
- Being able to share rewards and awards.
- The ability to give credit to others.
- Doing things that need doing, whether these are required by a given job description or are the favorite-or not-of the doer.
- Encouraging feedback and acting on it, and then giving feedback to those who risk giving us ideas and criticism.
- Initiating contact with disparate systems.
- Creativity.
- Risk taking.
- Communicating caring.

"Excellence" for leading edge workers in the field includes:

- Being comfortable with their jobs, but not too comfortable so as to get into a rut.
- Enjoying the art of their work.
- Rehearsing for coming events either in their minds or with others.
- Learning from their own mistakes.
- Examining the worst consequences of an action before taking the risk.
- Always taking time for planning and not merely swinging from crisis to crisis.
- Being adept in communicating their ideas.
- Seeking responsibility rather than artfully dodging it.
- Being inclined to champion new ideas and projects rather than letting them die untried or depend on the familiar at all times.
- The ability to reject perfectionism and act when necessary.
- Creating a balance between autonomy and direction.
- Being good team builders.
- Seeing the importance of quality training for themselves and those with whom they work on an ongoing developmental basis.

Yes, volunteerism is what my life is all about. Let us hope excellence is a part of it for all of us working in the Volunteer World.

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Motivating Volunteers Through Enhancing Their Competence

Eva Schindler-Rainman

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Volunteer motivation is a complex and changing dynamic. Volunteers give and get as a result of giving. And so it should be. Therefore this article will deal with ways to enhance the competence of volunteers so that they give even better service, and also so that they continue to feel motivated to volunteer.

Competence means skill, capability, and a feeling of confidence and comfortableness with what one is and does. It is important for persons to feel good about themselves and their activities regardless of age or stage of life. A competent self-image energizes people to act, and to become involved with others, and increases the possibilities for desire to learn more, and to contribute and expand as a person.

Among the motivations to volunteer are: the wish to learn; the hope to succeed; the eagerness for new experiences; the desire to help and give of self; the need to exert power and influence and to participate in problem solving and decision making; the possibilities of having fun; the demand to advocate chosen causes; the need to feel needed; the longing to make a difference; the chance to add experiences to one's resume; the aspiration to meet new people and make new friends; opportunities to be creative; the ambition to become more visible and perhaps socially more mobile; and the desire to become more skillful, more knowledgeable, more useful, and more competent.

People who volunteer do a great variety of jobs that might fall into these categories: administration and policy making, direct service, connecting providers and consumers of services, research, social action, fund raising, and human kindness jobs. Today's volunteers are persons from three to one hundred and three, male or female, from all racial, ethnic, national, and religious groups, from all life style and economic backgrounds, employed as well as unemployed, professional and blue collar, home executives and corporate executives, as well as healthy and at risk persons. In other words, anyone can be and is a volunteer. The possibility of increasing their motivation through enhancing their competence applies to each and every present and potential volunteer.

PROGRAMMING FOR COMPETENCE

How then can competence, achievement and improvement be part of volunteer management systems?

1. There must be a *diagnosis of a volunteer's motivations, needs, and skills.* This can be done through one-on-one placement conversations, or group interviews. In some instances pen and pencil instruments are used. Or it is possible to give potential volunteers an opportunity to explore and experiment to see what they can do in any given volunteer job. Self-evaluation can also be utilized.

2. It is helpful to have *clear delineation of each volunteer job,* and the qualifications needed. However, this must be a flexible description, whenever possible, so that prospective volunteers are challenged and excited rather than feeling overwhelmed and incompetent.

3. *Supportive and careful placement* with appropriate (to the job and to the volunteer) training is part of any humane volunteer management program and progress. Placement may include a trial period so that both the volunteer and the volunteer manager can see if the job is suitable and satisfying both ways.

4. Clear *definition of and agreement on service* and/or product outcomes are absolutely essential. Volunteer service must be measurable. Persons who volunteer want to know what is expected of them, and why it is a necessary task. Administrators and boards need clear accounting of volunteer contributions to a service.

5. They need *regular feedback sessions* on how things are going. These sessions should give opportunities to volunteers and professionals to give reciprocal feedback so that competence is increased both in terms of task and process.

6. *Opportunities for growth and change* can be included to motivate volunteers as they become familiar with the volunteer job, the system, the mission of the system, and as they become more comfortable and more competent. For instance, experienced volunteers can help train new persons.

7. Ongoing *learning opportunities are important.* These may be formal seminars and workshops, or informal on-the-job conferences. They may be chances to participate in sessions in-house, or in conferences and classes in the community. Not only is the need to learn an important motivation, but also competence is increased through learning new or additional skills, or increasing knowledge in particular areas.

8. *Opportunities to influence the system* can also be made available. Often volunteers in a particular program or service have useful ideas for improvements. For example,

volunteers in the intake service of a large welfare agency suggested ways to simplify the application blanks clients had to fill out. They also suggested that these forms be translated into several other languages.

POSSIBLE TRAPS

1. When volunteers become both competent and confident they may provide some anxiety and *stress for paid staff.* In an era of economic restraint, paid personnel are worried about keeping their jobs, and they may perceive a threat to their job security when volunteers do a fine, useful, dependable and skillful job. Therefore it is essential to develop volunteer jobs that extend and enhance the work of paid persons. It must be made clear that volunteers are there to humanize and individualize services, and are *not* there to replace or displace the staff.

2. Another trap is *unclear definition of volunteer job(s), role(s) and relationships.* It is helpful for volunteers to have a defined support system including staff consultant, colleague relationships, and an understood place in the structure and function of the system.

3. *Lack of feeling part of a team* is another trap because it may lead a person to do his/her thing unrelated to the important others. Team building and maintenance is a motivator and enhancer of volunteer performance.

4. Trap number four may be that as volunteers become more competent they try to get *involved inappropriately in the management and operations of the system.* It helps to clarify appropriate ways to make suggestions, ask questions, and share ideas.

5. Competent *volunteers may get restless* unless they are given opportunities to participate in meaningful ways in influencing the system. For example, volunteer participation in all or selected staff meetings may be equally useful for the volunteer and the staff.

6. *Lack of clear communication lines and methods* is often a frustration for volunteers who care and who want to do a good job. Each volunteer must know who is her/his immediate listening ear.

7. *Lack of explicit recognition* of the volunteer's contributions and presence. Often between the official recognition events the important "we missed you" — "thank you" — "that is a splendid idea" are forgotten, or at least not expressed in meaningful ways.

SOME PAYOFFS OF HIGHLY MOTIVATED VOLUNTEER PARTICIPATION

For the System

Satisfied, competent, and motivated volunteers enrich a system in innumerable ways. They serve as *public and community relators* to enhance the visibility of the organization. They add resources of skill, knowledge, loyalty, service, and sometimes money.

Volunteers can *increase the quantity and quality* of the services of the system. For instance, a teacher can give just so much attention to 25 students, no matter how high the quality of that service. If one or two volunteer educational aides are also present in the classroom more students can get more individual attention. Teachers can then work with those students they feel need them most at any given point in time.

Confident, competent *volunteers can make life easier for staff.* Staff persons then have a support system on which they can depend. Also, paid personnel can safely delegate appropriate tasks to volunteers. This should decrease staff overwork load and the resultant stress. Also, good volunteers are important colleagues for the paid workers, and often become part of a *human service team.* This team, made up of persons with a varied menu of talents, skills, resources and experiences, can decide together how and when to deliver needed services.

Often competent service volunteers can be recruited to become *knowledgeable decision makers* as members of boards of directors and committees. Indeed it is helpful to have some enthusiastic, committed, knowledgeable insiders on today's decision and policy-making bodies.

For the Volunteer

1. *Enhanced self-image* as a result of good volunteer experiences motivate the volunteer and contribute to her/his personhood.

2. *New and/or increased skills* that can be utilized in other parts of the volunteer's life will keep the person's loyalty and increase interest and commitment.

3. *Knowledge, new or more,* about given areas such as health maintenance, mental retardation, youth leadership, is usually a welcome addition to a person's repertoire.

4. Often volunteers develop *increased human relations and communication skills,* which are transferable to home and other interactions.

5. *Meeting new people and making new friends* is *the* important motivator. When volunteers maintain such relationships it makes them feel competent as a friend and a colleague. On-the-job volunteer relationships may well be integrated into the volunteer's personal and social life.

6. Another pay-off for the volunteer is the fact that volunteer experiences and references can *become part of a person's resume* and useful in job and/ or educational pursuits.

7. Volunteering may help people *transit* from work to retirement; from paid work to volunteer work; from being married to being single; from many family responsibilities to fewer responsibilities; or in moving from one community to another.

SOME WAYS TO MEASURE COMPETENCE

If a volunteer job is well defined in terms of purpose, scope, and product(s), it should not be too hard to analyze its components and then measure the effectiveness of the efforts. There are a variety of tools available, including paper and pencil tests and check sheets, self-analysis and evaluation, videotaping of services being rendered with analysis by the consumer of the services, the volunteers, and the staff.

Group interviews, conducted at given intervals during the year are also useful measurement tools.

And it is possible to calculate in dollar terms how much time and effort volunteers are contributing to the system. Just determine a reasonable hourly or daily rate for volunteer services. These may vary depending on the service given.

Structured interviews with consumers of services can also be useful.

WAYS TO HELP VOLUNTEERS GROW

Daily on-the-job support and training are probably the most useful ways to help volunteers learn, grow, and change. Individual and group conferences, group seminars, workshops, classes, and meetings are all possible ways to help people learn. To these methods can be added observation, internship, seeing and analyzing videotaped or written case presentations, exploratory participation, audiotapes, and behavioral skill practice (Schindler-Rainman and Lippitt, 1977).

In order to grow and change, many people need to practice new behaviors, and behavioral skill practice is designed to help increase human relations skills. Volunteers also appreciate learning meeting design skills, influencing skills, communication skills, and collaboration skills. There is much that can be learned right on the job through skillful consultation with and supervision of the volunteer.

A real growth and development opportunity is for experienced volunteers to help new volunteers as orientors, trainers, co-workers, consultants and supporters.

Volunteers are also motivated or re-motivated when they can represent the system on community-wide committees, or as representatives to "outside the system" events.

Participation in staff meetings is another way to help volunteers learn more about the system. Also, such participation gives them an opportunity to share ideas, and for staff and volunteers to get better acquainted.

There are many, many ways to encourage growth of volunteers. It is important to remember that most people want to learn, to grow, and to develop to their fullest potential.

RECOGNITION

To be seen as a valuable "making a difference" person is important to all people. Recognition may be a smile, or the hand on the shoulder by another person. It may be a warmly said thank you, a handwritten note, or a supportive glance. Pins, plaques, and scrolls are often the more tangible awards given at special occasions (Schindler-Rainman, 1979).

New jobs or new and additional responsibilities are also ways to recognize the competence of a volunteer. It is possible that such acknowledgement in itself increases a volunteer's motivation to continue to work as a volunteer in the system.

Opportunities for additional training and education are perceived as a communication of the worth of a volunteer's contribution. It is important to individualize the ways in which awards, rewards, and other acknowledgements are delivered. Both informal and formal occasions are appropriate, and for many people some visibility is gratifying. This may be with pictures in the in-house or community paper, or being called on at a meeting attended by colleagues, family and friends, and having one's name on a program.

Volunteer personnel files are a rather recent form of recognition of the value of volunteer service, and of individual volunteers. Also, volunteer personnel policies are being developed as part of a volunteer human resource development trend.

Whatever vehicle is utilized, visibility and success are key motivators for most human beings. Also, volunteers feel recognized when they see that they are an integral and important part of a success oriented system.

It is clear from the foregoing comments that volunteers can, as part of lifelong learning, increase their competence and therefore their confidence. As this occurs they will become more turned on, more motivated to contribute their best to the services of the system or systems in which they find themselves. It is a challenge for administrators of volunteer services to ensure that the keys to motivation are always turned, and to realize that helping volunteers learn and become increasingly competent is a constant and rewarding task.

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HOW

To Order a Better Community

By John Wood

In 1955 the *New York Times* asked architect Frank Lloyd Wright what should be done with Pittsburgh. "Abandon it," he said. In 1985, however, *Places Rated Almanac* (Simon & Schuster) ranked Pittsburgh the most livable place in the U.S.

In the early 1960s sports columnist Jim Murray wrote of Cincinnati: "If it was human, they'd bury it." In 1986, however, *The Return of the Livable City* Acropolis Books) named it one of 40 cities that "pulled themselves up by their amenities."

In 1980 the Brookings Institution called St. Louis the nation's "most distressed big city." In 1985, however, the *New York Times* proclaimed "downtown St. Louis is booming."

What's going on here?

What's going on is that America's cities are making a comeback. A civic renaissance is taking place as more and more community leaders and residents are demanding a better place to live - and getting it.

How does your city fare? The following catalog provides an opportunity to "order" a variety of civic amenities, any one of which can raise the quality of life - and the economy - in your community. To help you get started, we've included an actual coupon to send to your mayor, city council, newspaper editor or neighborhood association. It's your opportunity to say, "Hey, downtown could use a facelift."

A symbolic order form won't get you what you really want, however. For that you need a project, a plan to carry it out, a populace committed to the idea, a pool of leaders who can not only envision the way cities ought to be but remember the way cities once were, and a cost that individuals and communities can afford.

Enjoy your "shopping spree," and expend your resources wisely. What better way to complement our special "leadership issue than to lead the way in making all of our cities livable once again?

A potpourri of styles

Culture

One way to rejuvenate a dull downtown, bring in new businesses and revenue, and fill your weekends with activity is with the arts. *Music* (develop a symphony orchestra; build a concert hall/amphitheater to attract top-name performers; organize an annual jazz/pop/rock/big-band festival). *Fine arts* (encourage local galleries to spring up; commission statues for your city's parks; plan an arts-and-crafts fair to lure out-of-town artists). *Performing arts* (form your own dance troupe; build a theater-in-the-round; start a community theater group).

Many shades of green

Outdoors

Enhance the natural beauty of your community by taking advantage of its geographical features. *Rivers* (initiate a clean-water campaign; build picnic sites; encourage riverfront development). *Lakes* (plan a marina complex; lobby for a bike path around the perimeter). *Parks* (plant more trees; start a conservation program).

Dubuque, Iowa: When a major railroad suspended its tours to the city several years ago, a riverboat ride company was launched to fill the gap. Result: Robert's River Rides today operates three ships and draws 250,000 tourists a year to the area.

Best value for your money

Humanities

A well-coordinated effort in this area will attract more businesses with high-education employees. *Knowledge* (open a library; add a museum; organize a speaker's forum). *Observation* (build a zoo; construct an aquarium; plan an arboretum).

Richmond, Indiana: To help boost student attendance, PIP (Positive Incentive Program) was created in 1984 to offer $100 awards to students achieving 100 percent attendance. Result: The next year, the number of students with perfect attendance jumped from 37 to 222 and expulsions declined more than 30 percent.

10 lessons for civic leaders

These ideas were gleaned from a speech at last year's National Conference on Civic Renewal in Boston. The speaker was Benjamin Barber, professor of political science at Rutgers University and author of ***Strong Democracy*** *(University of California Press, 1984).*

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1. Citizens participate in three ways: They (a) stop something (easy to do, but the ultimate test is to make something happen), (b) get something for their group (better, but a bit selfish), or (c) get something for the community (best by far).

2. Participation without empowerment is a fraud. Once people get a piece of the system, they'll defend the system.

3. Influence elected officials, don't just elect them. Your right is to govern yourselves, not just to choose your governors.

4. Seize an issue to which the city hasn't responded. Trap: Don't stop once that crossing guard has been okayed, go on to another project. Too many groups peter out after a victory. If a new sense of community was born, why douse the fire?

5. Everything starts with one person—especially in a dead community. You may discover a lot more people are thinking the same thing.

6. Don't be afraid of new ideas. I've never seen even a dumb public propose something that doesn't show they're at least on to something.

7. Don't believe these myths: (a) A good mark of citizenship is watching the news rather than *Dallas*—watching isn't participating. (b) The system isn't designed for citizen dissent—stand up and argue. (c) A healthy community is a quiet one—don't be afraid of friction.

8. Like marriage, true citizenship is a transformation process: All of a sudden more things become important to you; i.e., your sympathies are extended to your spouse, family, etc.

9. Don't practice NIMB (Not In My Backyard) thinking; i.e., don't just push a problem into the next neighborhood: Eradicate it.

10. Most people spend only a couple of days a year as true citizens (watching current affairs shows on TV and voting). Don't be a spectator; be a vigorous, active citizen!

It's you, it's you!

Image

Some cities have such a definable character you don't even have to spell them out: the Big Apple, the Windy City, Baghdad by the Bay. Having a unique image gives you an edge in luring tourists, residents and new businesses. *Sports* (build a stadium/arena; bid for a major professional sports franchise; boost support for a local college athletic program). *Business* (develop an industrial center; construct a convention center; build an airport or modernize your old one). *Tourism* (organize a convention and visitors bureau; start a civic pride campaign; improve your community's image if it's poor).

Designer labels

Design

Another mark of individuality that sets cities apart—and pays for itself by attracting people and firms—is their "look." Miami, Santa Fe, Boston: Each has a style all its own. *Architecture* (organize a design competition; start a historical preservation program; restore old and abandoned structures). *Landscape* (redesign such basics as parking lots, road signs, community entrances and lighting; promote outdoor art/mural projects; explore new ways to combat graffiti).

Winchester, Kentucky: Main Street was an eyesore, so wires and cables were put underground and more trees were planted. Result: pleasure in going downtown again.

10

building blocks for civic progress

These tips were taken from a Citizen Participation workshop at last year's National Conference on Civic Renewal in Boston.

1. Pin politicians down on their own rhetoric. If your mayor always says, "I'm for citizen participation," he's committed himself. Use it to your advantage.

2. Develop an issue. The best go beyond mere paper programs. ("I Love Dayton" buttons never work.)

3. Test it out. Ask people to sign petitions, invite them to meetings, etc. If no interest is generated, it's a sign you need to rework your issue.

4. Research how things are done in your area. You don't want to waste time or step on any toes.

5. Narrow your target. Focusing makes it harder for the government to ignore the issue—or you.

6. Build support. Invite local officials to your meetings. Later, you'll need all the allies you can get.

7. Ask for more than you want. Give the government a chance to say, "We can't give you the first two, but how about the last one?"

8. Welcome input from other neighborhoods. Imposing your views will only make enemies.

9. Know who you are. A cocky attitude going in ("We demand to be an advisory arm of government!") may only alienate you from officials.

10. Work as a team. If all neighborhoods use the same stationery, forms, procedures, etc., you'll seem unified. —*J.W.*

We're number one!

Neighborhoods

Enhancing pride and preserving heritage in your territorial and ethnic districts are perhaps your greatest responsibilities. *Ethnicity* (honor religious/cultural holidays with celebrations/parades; put on a food festival; design a walking tour). *Appearance* (start a cleanliness campaign; invoke tougher environmental standards; enact strict building/landscaping codes). *Unity* (start a neighborhood-watch program; publish a newsletter; organize weekly town meetings).

San Francisco: Nob Hill's Hooker Alley was once a trashy wasteland—before SLUG (San Francisco League of Urban Gardeners) converted it to a community garden. Result: more pride, activity and fun in the neighborhood.

Down-to-earth essentials

Basics

None of the above can be achieved, however, unless your primary needs are met—so although the next set of projects may not generate much excitement, don't overlook them: They may prove to be your most valuable amenities. *Services* (ensure medical facilities are up to standards; lobby for more age-related activities; seek adequate housing and transportation). *Jobs* (generate projects that will create more jobs; pinpoint where unemployment and layoffs are high; find better methods to attract new businesses and keep existing ones).

Tools for civic change

- Partners for Livable Places, 1429 21st St NW, Washington, DC 20036 (202-887-5990) should be the starting place for anyone with civic revitalization in mind. (This catalog was based in part on a list of civic factors from Partners.) It offers a wide range of services and publications, its Livability Clearinghouse provides research on any community-improvement issue you want, and its consulting service can visit your community and "audit" your city's assets.
- National Civic League, 55 W 44th St, New York, NY 10036 (800-223-6004 or 212-730-7930) provides CIVITEX, a local projects information and referral service; *National Civic Review*, a bimonthly journal that highlights community problem-solving techniques; an Advisory Service that provides on-site assistance; and the Civic Index, a 10-step checklist for evaluating your city's problem-solving capacity.
- The Regeneration Project, 33 E Minor St, Emmaus, PA 18098 offers a newsletter, workshops, a Regeneration Environmental Education Kit, and its community-building data base.
- National Association of Regional Councils, 1700 K St NW, 13th floor, Washington, DC 20006 will refer you to the local regional council nearest you. Councils offer publications and advice on how localities can work together to solve problems.
- National Center for Citizen Involvement, 1111 N 19th St, Ste 500, Arlington, VA 22209 helps mobilize volunteers to solve community problems. For information on volunteer centers in your area or how to develop your own, send a stamped, self-addressed envelope to the address above. —*J.W.*

Use this coupon to order what you want for your community!

Clip and send to your mayor, Congressperson, city council, newspaper editor, or neighborhood association. (Including your address and phone number definitely adds clout to your request.)

I want to help make our cities livable once again. To help me do that, **Modern Maturity** *has provided me with this coupon to add my vote for the amenity I think our city needs most to make it a better place to live.*

What my community needs most is:

Signed:

Address:

Phone number:

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SAMPLE FORMS AND NEWS RELEASES

The following materials are copies of those developed during the pilot testing of the LEAR program. Although most are specific to the locality in which they were developed, the general content of the materials is useful for designing forms, news releases, and awards to participants.

Attachment A -	**Application for Leadership Enhancement for the Active Retired** A example of how to design an application for those interested in the program.
Attachment B -	**Scholarship application** An important adjunct to the application form; if a fee is charged for the course, it is important to have opportunities for those unable to pay the fees to have a chance to participate.
Attachment C -	**Evaluation form** An important element of the program is to allow participants to evaluate each presentation at the retreat and the weekly session.
Attachment D -	**Certificate awarded to graduates of Leadership Enhancement for the Active Retired** This symbol of achievement is an important component of the program; it brings closure to the process and recognizes the investment of time and work of participants by those sponsoring the program.
Attachment E -	**Announcement of LEAR sent to prospective participants** It is important to develop and have available for distribution in the community, information about the program; it can be used to both solicit community funds to support the program as well as provide information to prospective participants.
Attachment F -	**Updated Personal Information form** Those interested in monitoring the program participants and in building documentation on graduates will find it useful to develop a form to update the records on participants. It is also useful in identifying persons to take on specific community leadership assignments.
Attachment G -	**Sample news releases** A key to a successful program is getting information to the public media. These sample news releases can be useful in designing ones appropriate to your community.

ATTACHMENT A

University Extension
UNIVERSITY OF MISSOURI
LINCOLN UNIVERSITY

UNIVERSITY EXTENSION
MINERAL AREA COLLEGE

"KNOWLEDGE WORKING
FOR MISSOURIANS"

Gerontology Center
Flat River, MO 63601
(314) 431-4593 ext. 56

APPLICATION FOR LEADERSHIP ENHANCEMENT

FOR THE ACTIVE RETIRED

PERSONAL INFORMATION

(Please print or type information)

NAME____
(last) (first) (middle)

ADDRESS____
(street) (city) (state & zipcode)

COUNTY________________________ TELEPHONE________________

SOCIAL SECURITY NUMBER____________ AGE_____ DATE OF BIRTH____________

EDUCATIONAL DATA

	HIGH SCHOOL	OTHER	COLLEGE
CIRCLE HIGHEST GRADE COMPLETED:	9 10 11 12		1 2 3 4 5 6

LOCATION OF HIGH SCHOOL ATTENDED:____________________________

COLLEGE DEGREES HELD, IF APPLICABLE:____________________________

COLLEGES OR SPECIAL SCHOOLS ATTENDED:____________________________

LIST AWARDS OR SPECIAL RECOGNITION YOU HAVE RECEIVED IN THE PAST:________________

(OVER)

University of Missouri, Lincoln University, U.S. Department of Agriculture & Local University Extension Councils Cooperating

an equal opportunity institution

MILITARY SERVICE

'AVE YOU BEEN IN THE MILITARY? ________YES ______NO

IF YES, WHAT SPECIAL SKILLS DID YOU ACQUIRE?____

____

EMPLOYMENT STATUS

______EMPLOYED ______FULL TIME ______PART TIME ______RETIRED

CURRENT TYPE OF EMPLOYMENT (if employed): ____

____

IF RETIRED, PLEASE INDICATE TITLE AND TYPE OF JOB:__________________________________

____

PREVIOUS LEADERSHIP TRAINING: ________YES ________NO

ᵀF YES, PLEASE LIST TYPE AND APPROXIMATE YEARS:____________________________________

____

PREVIOUS LEADERSHIP EXPERIENCE (organizations, government, volunteer experience):

________YES ________NO IF YES, PLEASE LIST TYPE AND APPROXIMATE YEARS:________

____

____

HOBBIES AND/OR SPECIAL INTERESTS, PLEASE LIST:____________________________________

____

____

PHYSICAL LIMITATIONS AND/OR SPECIAL DIET REQUIREMENTS-PLEASE ADVISE:______________

____

____

UNIVERSITY EXTENSION PROGRAMS ARE OPEN TO ALL.

(OPTIONAL)

PLEASE WRITE A BRIEF PARAGRAPH SHARING WHAT YOU HOPE TO LEARN FROM THIS PROGRAM AND HOW IT MIGHT BENEFIT YOU PERSONALLY:

ATTACHMENT B

University Extension
UNIVERSITY OF MISSOURI
LINCOLN UNIVERSITY

UNIVERSITY EXTENSION
MINERAL AREA COLLEGE

"KNOWLEDGE WORKING
FOR MISSOURIANS"

Gerontology Center
Flat River, MO 63601
(314) 431-4593 ext. 56

SCHOLARSHIP APPLICATION

FOR THE PROGRAM

LEADERSHIP ENHANCEMENT FOR THE ACTIVE RETIRED

NAME________________________ ADDRESS________________________

CITY________________________ STATE______________ZIP__________

PHONE________________________ SEX__________BIRTHDATE__________

ENTER YOUR GROSS INCOME FOR 1988________________________

USE THE SPACE BELOW TO WRITE A BRIEF STATEMENT INDICATING YOUR REASON FOR REQUESTING A SCHOLARSHIP.

SIGNATURE________________________ DATE________________________

(Information on this form will remain confidential and will only be used as a basis for awarding a scholarship)

Attachment C

LEADERSHIP EHANCEMENT FOR THE ACTIVE RETIRED
EVALUATION FORM

Extension Staff Member in Charge:______________________________________

Program Title:____

Location:__________________________ Date:______________________

INSTRUCTIONS: What did you think about the eight sessions? Read the statements and circle the number which expresses your opinion.

1. BEFORE the sessions, my level of knowledge about the topics was:

   high 5 4 3 2 1 low

2. AFTER the sessions, my level of knowledge about the topics was:

   high 5 4 3 2 1 low

3. Purposes of the eight sessions were accomplished:

   high 5 4 3 2 1 low

4. The overall quality of the sessions was:

   high 5 4 3 2 1 low

5. The presentations and activities of the sessions were:

   beneficial 5 4 3 2 1 not beneficial

6. The material presented during the sessions was:

   applicable 5 4 3 2 1 not applicable

7. The speaker(s) encouraged participants to express their own views:

   strongly agree 5 4 3 2 1 strongly disagree

8. My expectations for the sessions were:

   fulfilled 5 4 3 2 1 unfulfilled

9. I would recommend the sessions to others:

   fully 5 4 3 2 1 not at all

10. List your suggestions for improving the sessions:

____

____

____

____

11. List your suggestions for other topics that should have been in the eight weekly sessions and those that were not appropriate:

____

____

____

____

12. Present any other comments below:

____

____

____

____

Attachment D

UNIVERSITY OF MISSOURI EXTENSION DIVISION

CERTIFICATION OF LEADERSHIP TRAINING

This is to certify that

Bertha M. Midgett

has successfully participated in the

LEADERSHIP ENHANCEMENT FOR THE ACTIVE RETIRED

March 28, 1989----May 23, 1989
(32.5 hours)

University Extension
UNIVERSITY OF MISSOURI
LINCOLN UNIVERSITY

Mineral Area College
Gerontology Center
Flat River, MO 63601

Regional Director

Marian C. Dobbs
Continuing Education Specialist

Attachment E

SCHEDULE OF EVENTS

Orientation Dinner.....March 16, 1989
Rosener's Restaurant

Retreat.......March 28, 29 & 30, 1989
Trout Lodge-Potosi, MO

Weekly Sessions..3:00 P.M. to 5:30 P.M.

Session 1.......April 4, 1989

Tour....April 10 & 11, 1989

Session 2......April 12, 1989

Session 3......April 18, 1989

Session 4......April 25, 1989

Session 5.........May 2, 1989

Session 6.........May 9, 1989

Session 7........May 16, 1989

Session 8........May 23, 1989

All Sessions will be held on the campus of Mineral Area College.

Instructors will include experts from the University of Missouri, Mineral Area College, citizen leaders and government and private enterprises.

The University of Missouri is an equal education and employment opportunity institution

COURSE CURRICULUM

The Retreat will provide a foundation for applying group and public leadership techniques, problem-solving methods and community analysis techniques.

The Sessions will include lectures, workshops, study tours and conferences. Topics of the individual sessions will include volunteerism, group motivation, communications, working with committees, group process skills, citizen participation and others.

Session 1-Assessing our Individual Leadership Skills
Session 2-Communications and Holding Effective Meetings
Session 3-Working with People in Small and Large Groups
Session 4-Issue Analysis and Resolution
Session 5-Public Policy and Community Concerns
Session 6-The Role of Local Government in Community Issues
Session 7-Volunteerism and Community Issues
Session 8-Opportunities for Involvement

We invite each participant to share with the group their own knowledge and expertise during this high quality, practical, in-depth learning experience.

University Extension
UNIVERSITY OF MISSOURI
LINCOLN UNIVERSITY

LEADERSHIP ENHANCEMENT

FOR THE

ACTIVE RETIRED

An Innovative Program Funded
by the

KELLOGG FOUNDATION

GERONTOLOGY CENTER
MINERAL AREA COLLEGE
FLAT RIVER, MISSOURI 63601

WHO IS OR?

Leadership Enhancement for the Active Retired is an educational program developed for persons with leadership experience in a previous occupation. It is designed for persons who enjoy new challenges and who want to contribute to their community.

WHAT WILL IT DO?

Participants will learn to use both old and new skills effectively in community and public problem-solving. The experience also may open new opportunities for part-time careers that make your community a better place to live.

Participants might wish to use their skills and knowledge as future leaders in local government, members of agency and public boards, civic organizations and in groups concerned with community and public problem solving.

WHAT WILL IT COST?

Beside your time and effort, the cost is $100 for a three-day retreat. The Kellogg Foundation will fund all other costs of the project. Scholarships are available for those who need them. Your reward is your increased skills and community involvement together with participating in a program that is designed to have national impact.

WHEN WILL IT HAP

The second class begins in March 1989. About 20-25 active retired persons will be selected for this second class.

WHERE'S THE ACTION?

The Project Office is located in the Gerontology Center in the Mineral Area College Library on the southwest corner of the second floor. The Gerontology Center was established through cooperative efforts of the Mineral Area College and Missouri University Extension. It is a resource center for research, education and literature relating to gerontology. The Center also serves as the local link to all campuses of the University of Missouri.

HOW WILL IT BE DONE?

Experts in the field of leadership development will teach participants to be leaders in public decision-makings and public problem solving. From eight to ten sessions are planned, including a one or two day field trip designed to give first hand experiences. Most sessions will be held on the Mineral Area College Campus.

HOW DO I FIND OUT MORE?

Contact the Gerontology Center at Mineral Area College between the hours of 8:00 A.M. and 4:00 P.M.. Phone (314) 431-4593 Ext. 256

------------------------------ DETACH AND RETURN ------------------------------

APPLICATION REQUEST FORM

Please send an application for enrollment in the Leadership Enhancement for the Active Retired to:

NAME________________________________

ADDRESS______________________________

____

PHONE_______________________________

RETURN TO:

Gerontology Center
Mineral Area College
Flat River, MO 63601

Check made payable to St. Francois County Extension Council must accompany your application.

BEST COPY AVAILABLE

Attachment F

UPDATE OF PERSONAL INFORMATION FOR

"LEADERSHIP ENHANCEMENT FOR THE ACTIVE RETIRED"

NAME: ______________________________
LAST FIRST MIDDLE

DATE: ______________________________

LIST BELOW THE CHANGES THAT HAVE OCCURRED SINCE "LEADERSHIP ENHANCEMENT FOR THE ACTIVE RETIRED" BEGAN:

EMPLOYMENT ______________________________

____

____

____

MEMBERSHIP IN ORGANIZATIONS ______________________________

____

____

____

VOLUNTEER ACTIVITIES ______________________________

____

____

____

ADVISORY BOARDS OR COMMITTEES ______________________________

____

____

____

LEADERSHIP ROLES ______________________________

____

____

____

OTHER ____

____

____

____

PERSONAL COMMENTS - IF YOU FEEL "LEADERSHIP ENHANCEMENT FOR THE ACTIVE RETIRED" HAS INFLUENCED OR IMPACTED THESE CHANGES, WE WOULD APPRECIATE YOUR THOUGHTS AND COMMENTS: ____

____

____

____

____

____

____

____

____

Examples of LEAR news releases that could be used are:

Sample #1

"Leadership Enhancement for the Active Retired", a vital community leadership training experience for the older adult, will begin on (date), at (place).

The program is designed to enhance the leadership capabilities of the "active retired" so they can use their time and talents in activities that strengthen their communities while adding purpose to their personal lives. The general goals of the program include the following:

1. To cultivate the skills and expertise of older adults gained from their life and career experiences.
2. To enable participants to develop their understanding of the public decision-making process.
3. To introduce the additional skills necessary for them to grasp the complexities of public issues.
4. To identify methods they can employ to solve community problems.

"Leadership Enhancement for the Active Retired", or LEAR, is intended to increase the number of informed and skilled community leaders available to serve in various leadership and problem-solving capacities within the community.

A retreat on (date), at (place), will kick-off the LEAR program. Following the retreat, (number), sessions will be held consisting of instruction by leadership experts. There is a ($) cost for LEAR which covers materials and lodging.

For more information and an application for participation, please contact: (name, address, phone number).

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Sample #2

Everyday a growing number of older Missourians are saying good-bye to full-time employment, and entering that stage of life known as retirement. Studies show that people are retiring earlier and living longer. Retirees of today are better educated, healthier, and more politically astute than ever before. They are active, energetic, and possess strong leadership skills and expertise developed through years of career experience. After a short rest (doing those things they always wanted to do but could not while working full-time), many are ready to examine these options, opportunities and welcome new challenges.

"Leadership Enhancement for the Active Retired" is just the program to provide retirees these new choices. LEAR is a community leadership training experience for the older adult which enhances existing leadership skills.

This experience requires approximately (number) hours of participant time during a (time frame) period. It includes an orientation dinner for the participants and their spouse or friend, a three-day educational retreat (optional), followed by (number) sessions.

LEAR provides active retired citizens the opportunity to give of themselves for the public good. It will also create a reservoir of trained and experienced leaders who will help their communities.

If you would like more information about this program, contact (name), at (address), (phone).